

community action partnership of san bernardino county

# helping people



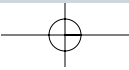
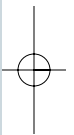
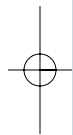
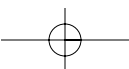
# changing lives

2005-2010 STRATEGIC PLAN



COMMUNITY ACTION PARTNERSHIP  
OF SAN BERNARDINO COUNTY

# 2005 2010

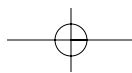
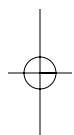
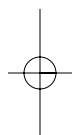
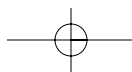


community action partnership of san bernardino county  
2005-2010 STRATEGIC PLAN

helping people.  
changing lives.



COMMUNITY ACTION PARTNERSHIP  
OF SAN BERNARDINO COUNTY





*“The Strategic Plan will help us prioritize and maximize our resources to achieve optimal results based on impact and outcomes. The Plan will also provide guidance for targeting other community needs and identifying additional funding sources. The Strategic Plan is not the end but the beginning of a new journey towards achieving self-sufficiency for the low-income residents of San Bernardino County.”*

*—Michael J. Gallo, Chair, Board of Directors*

Dear Partner,

Last year Community Action Partnership of San Bernardino County (CAPSBC) engaged the community and stakeholders in reviewing the current environment in which our organization operates, and in developing a guide to enhance how we provide supportive services to San Bernardino County's low-income individuals and families.

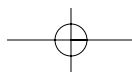
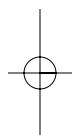
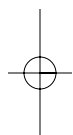
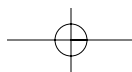
On behalf of our Board of Directors and staff, I am extremely pleased to present Community Action Partnership of San Bernardino County's Strategic Plan for 2005-2010. This dynamic document will serve as a road map for the future and guide our organization in the next five years. The Strategic Plan is the outcome of over twelve months of dedication and hard work provided by the Board of Directors, staff and stakeholders and all the participants engaged throughout the process. The Strategic Plan was designed to develop strategies that will enhance CAPSBC's capacity to continue to be responsive to the needs of the low-income community in light of the changing face of poverty. An annual review and updating of the Strategic Plan will be conducted to ensure that our strategies continually reflect and address the needs of the community we are here to serve.

Thank you to all who participated in this comprehensive and meaningful process and we welcome your continued involvement and support in the implementation and evaluation our Strategic Plan.

Sincerely,

A handwritten signature in black ink, appearing to read "Patricia L. Nickols".

Patricia L. Nickols  
Executive Director



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# strategic plan

## executive summary

In February of 2004, the Community Action Partnership of San Bernardino County (CAPSBC) launched a process to develop a Strategic Plan that will guide the future work of the organization over the next five (5) years. With the recent transition from a public to a private non-profit organization, CAPSBC recognizes the potential opportunities for the organization and the importance of a strategic plan in order to seize them. During a twelve-month period, the CAPSBC engaged the Board of Directors, staff, partners, community and business leaders, and clients to identify important trends and opportunities and develop a strategic direction for the next one to five years. This plan reflects the collective time, effort and thoughtful input of these individuals as well as their dedication and commitment to serving the low-income residents of San Bernardino County.

The Strategic Plan describes the agency's core values, vision, mission, strategic priorities and strategies developed during the process and provides a clear path for CAPSBC staff in realizing the agency's mission of providing assistance to San Bernardino County low-income communities.

The CAPSBC Vision is:

*Fulfilling the Promise of Community Action—building healthy communities in the spirit of dignity and hope, free from poverty.*

The CAPSBC Mission is:

*Working in partnership with the San Bernardino County communities to support low-income residents in achieving self-sufficiency.*

The Strategic Plan was developed to align with the mission of the National Community Action Partnership, the national organiza-

tion representing the interests of approximately 1,100 Community Action Agencies (CAAs) working to fight poverty at the local level. The Plan will also help the CAPSBC Board of Directors, staff and community fulfill The Promise of Community Action—"Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other."

### STRATEGIC PRIORITIES/GOALS

The Strategic Priorities described in the Strategic Plan represent the priorities identified by the Board of Directors, staff, community, and stakeholders to enhance the organization's success in achieving its mission. The Strategic Priorities detail those opportunities that over



## goals

**Goal 1: Focused Programs** CAPSBC focuses its programs and services to address critical barriers to self-sufficiency for low-income people.

**Goal 2: Access** Low-income people in the County of San Bernardino can access the broad range of services they need to achieve stability and become more self-sufficient.

**Goal 3: Visibility** Low-income people, partner organizations, policy makers and the general public are knowledgeable about CAPSBC's mission and services.

**Goal 4: Advocacy** CAPSBC is recognized throughout San Bernardino County as a strong and effective advocate for low-income people.

**Goal 5: Organizational Capacity** CAPSBC has enhanced organizational capacity to support its clients to achieve self-sufficiency.

For more detailed information about the strategies and objectives developed during the strategic planning process, please refer to p. 16 of this report.

the next five years will have the most impact on the organization's accomplishments by providing a guide for effective decision-making for the organization. Each of the nine Strategic Priorities is supported by a series of action strategies and are the means by which the CAPSBC will achieve the goals and objectives outlined in this plan. The Strategic Priorities and goals are listed below.

- Strategic Partnerships
- CAPSBC Branding
- Policy Advocacy
- Programs and Services
- Funding
- Performance Measurement
- Staff Engagement
- Board Structure and Composition
- Organizational Infrastructure

*The CAPSBC Vision is:  
Fulfilling the Promise  
of Community Action—*

*building healthy  
communities in the  
spirit of dignity and  
hope, free from poverty.*



# introduction

Community Action Partnership of San Bernardino County (CAPSBC) is a private, non-profit public benefit corporation and is one of the 1,100 Community Action Agencies nationwide dedicated to assisting low-income individuals and families to become stable and self-reliant. Formerly known as the Community Services Department, CAPSBC was established in 1965 as a result of the Economic Opportunity Act (EOA) of 1964. The EOA was signed into law by President Lyndon B. Johnson to support his declaration of an unconditional “War on Poverty.”

Through collaborations with a host of community partners, other agencies and the efforts of dedicated staff and the Board of Directors, CAPSBC annually serves over 850,000 low-income individuals and families in 78 cities and communities of San Bernardino County—from the outlying areas of Trona on the north, Needles to the east, Joshua Tree to the south, and the communities in between. The following describes CAPSBC’s major programs.

- **Family Development Program** (FDP) provides holistic case management to homeless and low-income families, a transitional housing program, child support services and a variety of emergency assistance services including rental assistance, food vouchers and bus passes.
- **Energy Conservation/ Weatherization Program** provides eligible low-income residents with weatherization measures for their homes, appliance repair and replacement, energy assistance, energy education and lead-based paint hazard reduction, plus assistance with processing applications for the Home Energy Assistance Program (HEAP).
- **Nutrition for Seniors** (NFS) provides no cost hot meals five days-a-week to seniors, age 60 and older and their spouses in senior centers or by home delivery.
- **Food Stamp Employment and Training** (FSET) provides able-bodied adults between 18-

50, without dependents, with food stamp benefits while gaining basic work skills and employment training.

- **CAPSBC Food Bank** provides food for low-income residents throughout San Bernardino County via government surplus commodity distributions and salvage food agencies through a network of approximately 170 non-profit and charitable organizations and congregate feeding agencies (soup kitchens).
- **Inland Empire Individual Development Accounts** (IEIDA) is a matched savings program that allows low-income workers to save earnings towards the acquisition of assets—a home, a small business or post-secondary education, as a way out of poverty.
- **CAPSBC Homeless Coalition**, is a partnership of public and private individuals and organizations, that have joined forces to share expertise and resources to address the issue of homelessness in San Bernardino County.

## introduction

CAPSBC leverages funding from a variety of public and private sources to provide its programs to the community. Currently CAPSBC is faced with the dual challenge of meeting the needs of a growing number of low-income County residents and the increasing competition for limited funds and shrinking resources. This Strategic Plan is a clear and practical tool to guide the organization to deal effectively with these challenges during the next five years. Every year, CAPSBC will assess its achievement against performance measures and will share its progress in an annual report.

A 15-member Community Action Board (CAB) oversees the general activities of CAPSBC. The CAB has a tripartite structure consisting of five representatives each from the public (elected officials), private and low-income sectors. Except for the months of August and December, the CAB meets on a monthly basis to set policy and the direction of the organization.

### CREATING A PLAN FOR THE FUTURE

For 40 years, CAPSBC has dedicated its efforts to advocate for the low-income people in San Bernardino County. The organiza-

tion's recent transition from public to private non-profit status opened a door to new opportunities—new ways to serve its clients, fund its programs and combat poverty. Embracing these possibilities, CAPSBC set out to create its first-ever strategic plan to guide the organization into the future.

The 12-month strategic planning process included a variety of methods for soliciting input from the Board of Directors, staff, clients and stakeholders. Each method was designed to be inclusive and open, respecting the geographic, ethnic and cultural diversity of San Bernardino County. The planning process had three core phases. (For a graphic representation of the strategic planning process see Appendix, page ES33.)

During **Phase One** of the planning process, the planning team developed a baseline of information and input to assess the current state of CAPSBC and the "environment" in which it operates. This phase included review of background documents and engagement of the Board of Directors, staff, clients, and partners to determine the agency's issues, opportunities and challenges. The Environmental Scan is a summary of the activities and

key themes generated during Phase One. The activities are explained in detail on page 13 of the report. The planning team worked closely with CAPSBC management and key agency partners to ensure the plan will respond to the needs of the clients. The following explains the roles of these groups:

- **Management Team** – The Management Team communicated the strategic planning process to staff. The planning team met with the Management Team on a regular basis and provided staff's perspective throughout the planning phases. The Management Team was made up of key managers representing each of the CAPSBC programs and divisions within the agency.
- **Strategic Planning Advisory Committee (SPAC)** – Representatives from public and community agencies, service providers, clients and staff comprised the SPAC. The SPAC shared their expertise and advised in the development of the strategic directions.

The key issues that were identified in the Environmental Scan were reviewed during **Phase Two**. Both the Management Team and SPAC met to review the emerging themes

identified in the Environmental Scan. During these meetings the Management Team and SPAC refined and prioritized these strategic priorities and began to develop the goals that the agency will achieve in the next five years.

**Phase Three** consisted of a Strategic Planning Retreat. During this final phase CAPSBC Board of Directors, staff and representatives of the Strategic Planning Advisory Committee convened for a one-and-a-half-day retreat to refine goals and develop key strategies. The retreat also provided a unique opportunity for these key stakeholders to engage in conversation about the organization's vision and mission and to examine the viability of both given the current environment. Members of the three groups gathered for a final meeting to confirm the strategies and the new vision and mission of CAPSBC, as well as to define objectives.

#### ORGANIZING THE PLAN

The strategic plan is organized into two sections:

##### Assessing Our Environment

This section provides an overview of the environmental scan activities undertaken in Phase I, as well as the

major themes that emerged. For a complete review of findings, refer to the Environmental Scan report in Appendix F of this document.

##### Setting Our Course

The next section describes CAPSBC's vision, mission, the Promise of Community Action, Code of Ethics, values and the goals the agency will strive to achieve in the next five years. This section also outlines CAPSBC's strategic priorities, strategies and the desired outcomes from

our work. The Result-Oriented Management Accountability (ROMA) process will be utilized to measure the success of CAPSBC's programs are identified on page 34.

#### ESTABLISHING A GUIDING FRAMEWORK

The Strategic Plan Framework on the next page provides a visual illustration of the relationship among the Strategic Plan Elements.

*The Strategic Plan will  
affirm our mission and  
provide focus and guidance  
for staff to deliver services  
to our clients...*

## introduction

## COMMUNITY ACTION PARTNERSHIP OF SAN BERNARDINO COUNTY

# Strategic Planning Framework

### VISION

Fulfilling the Promise of Community Action—building healthy communities in the spirit of dignity and hope, free from poverty.

### MISSION

Working in partnership with the San Bernardino County communities to support low-income residents in achieving self-sufficiency.

### GOALS

#### Goal 1: Focused Programs

CAPSBC focuses its programs and services to address critical barriers to self-sufficiency for low-income people.

#### Goal 2: Access

Low-income people in the County can access the broad range of services they need to achieve stability and become more self-sufficient.

#### Goal 3: Visibility

Low-income people, partner organizations, policy makers and the general public are knowledgeable about CAPSBC's mission and services.

#### Goal 4: Advocacy

CAPSBC is recognized throughout the County as a strong and effective advocate for low-income people.

#### Goal 5: Organizational Capacity

CAPSBC has enhanced organizational capacity to support its clients to achieve self-sufficiency.

### STRATEGIC PRIORITIES

Strategic  
Partnerships

CAPSBC  
Branding

Policy  
Advocacy

Programs  
and Services

Funding

Performance  
Measurement

Staff  
Engagement

Board  
Structure and  
Composition

Organizational  
Infrastructure

### STRATEGIES


### PERFORMANCE MEASURES

# assessing our environment

In Phase One of the planning process, CAPSBC worked with a strategic planning consulting team—Moore Iacofano Goltsman, Inc. (MIG)—to conduct an environmental scan to better understand the context in which the organization was planning and operating. The scan included both data collection and analysis, as well as input from staff, clients and stakeholders. This section summarizes the environmental scan activities and the major themes that emerged.

## ENVIRONMENTAL SCAN ACTIVITIES

- The CAPSBC Management Team was engaged in an exercise to identify the outcomes they desired from the Strategic Plan.
- Twenty (20) confidential interviews were conducted with key agency and community representatives to assess strategic issues and challenges facing CAPSBC.
- Strengths, Weaknesses, Opportunities and Threats (SWOT) analyses were facilitated with the Strategic Planning Advisory Committee (SPAC), Management Team, the CAPSBC Board of Directors and with the CAPSBC staff at a Staff Values and Opportunities Workshop. The SWOT analysis identified issues and challenges facing CAPSBC and reviewed assets, opportunities and trends by program area.
- CAPSBC staff participated in one of three Strategic Mapping activities, which included program/division level meetings, one-on-one meetings with program managers or supervisors, and key partner questionnaires. The purpose of these activities was to assess accomplishments, strengths, areas of improvement, trends, and opportunities.
- The Needs and Opportunities Corps—a group of approximately 30 volunteers—facilitated small group discussions and distributed questionnaires. Their efforts assisted CAPSBC to confirm the needs of low-income individuals living in the County, as well as identify assets and opportunities that CAPSBC could build on to best assist low-income residents in achieving self-sufficiency.
- Following their data collection activities, Corps members gathered at a Summit to share what they learned and provide input on CAPSBC priorities.
- Existing community needs assessments developed locally were gathered and summarized.
- Articles on recent national and statewide trends in public welfare were reviewed and synthesized.
- Focus Groups with CAPSBC clients and potential strategic partners were held to further explore emerging priorities and potential strategies for addressing those issues.
- Best practices review included practices from Community Action Agencies throughout the country and was used to inform the strategy development.



*The CAPSBC Mission is:  
Working in partnership  
with the San Bernardino  
County communities to  
support low-income  
residents in achieving  
self-sufficiency.*



## MAJOR THEMES

The following themes consistently emerged from the Environmental Scan activities and helped to form CAPSBC's strategic priorities:

- **Strategic Partnerships** Create new strategic partnerships, particularly with community-based, grassroots groups; the business community; educational institutions and other government-funded agencies that serve the same population to strengthen and expand services provided by CAPSBC.
- **CAPSBC Visibility** Expand CAPSBC marketing and outreach to policy makers, partner organi-

zations, funders, potential client groups and the general public.

- **Program and Services** Increase the number of people reached through CAPSBC services by increasing staffing levels, expanding existing services to outlying communities, and creating new programs to address service gaps. Gaps that surfaced as the most critical for CAPSBC clients included:
  - affordable housing;
  - employment and job training opportunities;
  - affordable health care; and
  - transportation.

Other major gaps noted were services for outlying areas and services for adults between the ages of 18 and 50 who do not have children.

- **Funding** Expand and diversify funding to sustain existing and develop new programs that respond to community needs within the context of the organization's mission.
- **Performance Measurement** Create a performance measurement system that gauges the real impact of CAPSBC programs for its clients.
- **Internal Communication** Create more forums and accessible tools for ongoing communication within and across agency programs.



*CAPSBC serves low-income individuals and families throughout the County of San Bernardino.*

## setting our course

# setting our course

## ENVISIONING THE FUTURE

The CAPSBC vision guides the agency toward the future. It briefly describes the ideal environment that is shared by staff and management. Through the planning process, the vision was reviewed and revised to reflect what the agency staff, partners, and community hope to see in the new future of the agency.

### Vision

The former CAPSBC vision is:

*Thinking globally, acting locally to build healthy communities one family at a time.*

The following renewed vision offers a compelling picture of the future for the San Bernardino County community and reflects the discussion between CAPSBC staff, Board of Directors and partner agencies during the Strategic Planning retreat:

***Fulfilling the Promise of Community Action—building healthy communities in the spirit of dignity and hope, free from poverty.***

## DETERMINING WHAT WE WANT TO ACHIEVE

The CAPSBC's mission statement describes the organization's core purpose and its role within the Community Action Agency structure as an advocate for the poor in the fight against poverty. The mission was revised to emphasize those areas that relate to relevant CAPSBC activities.

### Mission

The previous mission statement:

*To assist low-income residents of San Bernardino County in achieving economic self-sufficiency.*

The revised mission statement was developed by CAPSBC staff and confirmed by the Board of Directors:

***Working in partnership with the San Bernardino County communities to support low-income residents in achieving self-sufficiency.***

## THE PROMISE OF COMMUNITY ACTION

Where the vision guides CAPSBC toward the future and the mission

implements the vision, The Promise reaffirms the agency's commitment to those it serves. Community Action Agencies apply the following Promise to their daily work.

*Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.*

## RE-AFFIRMING OUR CODE OF ETHICS

The Code of Ethics is a set of guidelines established by the National Association of Community Action Agencies to assist local Community Action Partnerships in improving the lives of low-income individuals. Every employee of CAPSBC is expected to uphold these ethics in conducting their duties. The following Code of Ethics guides Community Action Agencies across the nation:

## setting our course

We, as community action professionals ever respectful of cultural diversity, dedicate ourselves to eliminate poverty in the midst of plenty in this nation by opening to everyone the opportunity for education and training; the opportunity to work; and the opportunity to live in decency and dignity, and commit ourselves to:

- Recognize that the chief function of the community action movement at all times is to serve the best interests of the poor.
- Accept as a personal duty the responsibility to keep up-to-date on emerging issues and to con-

duct ourselves with professional competence, fairness, and effectiveness.

- Respect the structure and responsibilities of the Board of Directors, provide them with facts and advice as a basis for their decision-making, and uphold and implement the policies adopted by the Board of Directors.
- Keep the community informed about issues affecting the poor and facilitate communications among the poor, the non-poor private sector, and locally elected public officials.

- Conduct our organizational and operational duties with positive leadership exemplified by open communication, creativity, dedication, and compassion.
- Exercise whatever discretionary authority we have under the law to promote the interests of the poor.
- Serve the community action movement with respect, concern, and responsiveness, recognizing that service to the poor is beyond service to oneself.
- Demonstrate the highest standards of personal integrity, truthfulness, and fortitude in our community action activities in order to



*We uplift and  
empower the  
community through  
our services and  
programs.*

## setting our course

# goals

### **Goal 1: Focused Programs**

CAPSBC focuses its programs and services to address critical barriers to self-sufficiency for low-income people.

**Goal 2: Access** Low-income people in the County can access the broad range of services they need to achieve stability and become more self-sufficient.

**Goal 3: Visibility** Low-income people, partner organizations, policy makers and the general public are knowledgeable about CAPSBC's mission and services.

**Goal 4: Advocacy** CAPSBC is recognized throughout the County as a strong and effective advocate for low-income people.

**Goal 5: Organizational Capacity** CAPSBC has enhanced organizational capacity to support its clients to achieve self-sufficiency.

inspire confidence in the community action movement.

- Perform our professional duties in such a way so as not to realize undue personal gain.
- Avoid any interest or activity which conflicts with the conduct of our official duties.
- Protect confidentiality in the course of our official duties.
- Strive for personal professional excellence and encourage the professional development of our associates and those seeking to become community action executives.

### **ORGANIZATIONAL VALUES**

Values are the shared beliefs, attitudes and behaviors that define the way an organization and the employees within the agency conduct their daily business and treat each other and their clients. CAPSBC employees identified the following as the key organizational values:

#### **Self-sufficiency**

We uplift and empower the community through our services and programs.

#### **Contribution**

As an organization and as individuals, we contribute and give back to the community.

#### **Responsibility**

We accept personal responsibility for the results of our work.

#### **Quality**

We have the expertise and skills needed to meet and exceed quality goals.

#### **Sustainability**

Our programs and services have both immediate and sustainable impacts.

#### **Personal Growth**

We seek and enjoy challenges; and our organization fosters personal and professional growth for its employees.

### **STRATEGIC PLAN GOALS**

CAPSBC's strategic plan goals on the left define what the organization seeks to achieve in the next five years.

## CHOOSING THE MOST STRATEGIC PATH

### Strategic Priorities

In this process, strategic priorities have been defined as new and fundamental opportunities to enhance the organization's success in accomplishing its mission. These opportunities will have impact on the organization or its clients in the short term (1 to 3 years) and will take significant effort to craft a solution. CAPSBC identified the following nine strategic priorities:

- **Strategic Partnerships** Create new strategic partnerships, particularly with community-based, grassroots groups; the business community; educational institutions; and other government-funded agencies that serve the same population to strengthen and expand services to CAPSBC clients.
- **CAPSBC Branding** Expand CAPSBC marketing and outreach to policy makers, partner organizations, and potential client groups.
- **Policy Advocacy** Build relationships with and educate local policy makers to enhance opportuni-

ties and services for the low-income community.

- **Programs and Services** Assess existing programs, as well as any new programs, to ensure that they are: 1) aligned with and advancing CAPSBC's mission to promote self-sufficiency; and 2) accessible to all potential CAPSBC clients.
- **Funding** Expand and diversify funding to sustain existing programs and to develop new programs that respond to community needs within the context of the organization's mission.
- **Performance Measurement** Create a performance measurement system that gauges the real impact of CAPSBC programs for its clients.
- **Staff Engagement** Expand opportunities for staff to participate in activities that foster a supportive work environment and create more forums and accessible tools for ongoing communication within and across agency programs.
- **Board Structure and Composition** Clarify Board roles and strengthen

the Board's active engagement in policy development and planning, and align Board composition and committee structure with CAPSBC's mission and strategic priorities.

- **Organizational Infrastructure** Enhance the organization's technological capacity and facilities.

### Strategies

Strategies are the means by which the organization will accomplish its goals and objectives. CAPSBC's strategies are organized by strategic priority and are aligned with the goals that they address.

The organization will also develop an annual work plan that specifies how each strategy will be implemented—what are the actions, what is the timeframe for implementation, who is the CAPSBC management lead, what other key partners will be involved in the action, and what resources will be needed for successful implementation. This work plan will be updated annually and utilized to shape individual staff work plans.

setting our course

## STRATEGIC PATH 1 strategic partnerships

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>1.1 Take the lead in working with the cities and other partners in San Bernardino County to expand the development of affordable housing for low-income individuals.</b>	Homeless Coalition, Inland Empire Individual Development Accounts Program	County Economic and Community, Development agency, SBC Housing Authority, developers, Local Cities, banking industry, housing coalitions, City Redevelopment Industry Associations, Home Aid of the Inland Empire, Department of Housing and Urban Development, State Housing and Community Development	Year 2-3
		●	●					
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>1.2 Strengthen and create new partnerships with non-profits, faith-based and community-based organizations, County Departments, City agencies, and local school districts to improve and create more direct service linkages for CAPSBC clients throughout the community.</b>	Family Development, Food Stamps Employment & Training (FSET), Nutrition for Seniors, Food Bank, Energy Conservation/Weatherization Program	County and Public School Districts, schools, faith-based and community-based organizations, Law Enforcement, Department of Behavioral Health, local universities, adult education, community colleges	Year 1
●	●	●	●					



## STRATEGIC PATH 1 strategic partnerships *(continued)*

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>1.3 Create a summit to convene representatives from partner organizations to share information on programs and services, and to develop joint referral processes.</b>	Administration	Children's Network, United Ways, Salvation Army, Habitat for Humanity, Boys and Girls Club, faith-based organizations, Volunteers of America, community colleges, universities, homeless service providers, Children's Fund and other public agencies	Year 1
		●	●					
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>1.4 Partner with other supportive social service agencies, where feasible, to co-locate CAPSBC programs and services throughout San Bernardino County, especially in outlying areas.</b>	Administration	Schools, San Bernardino Transitional Assistance Department (TAD), Community Centers, Public Housing Facilities, Jobs and Employment Services Department (JESD)	Year 4
●	●							
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>1.5 Develop new partnerships beyond current agency partnerships, including businesses.</b>	Administration	Agency Partners, Business, Chambers of Commerce, SBA, Existing suppliers	Year 1
		●	●					

setting our course

## STRATEGIC PATH 2 CAPSBC branding

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	2.1 Develop and implement an agency-appropriate marketing plan to make CAPSBC more visible.	Administration	Other Community Action Agencies (CAAs), Media, Partner Agencies	Year 1
	●	●						
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	2.2 Create a marketing and PR function to ensure the implementation of a marketing plan.	Administration	Marketing/PR Consultant	Year 1
	●	●	●	●				
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	2.3 Create opportunities for clients to participate in the implementation of the marketing plan.	Administration/ Operations	Partner agencies, clients	Year 1
		●	●	●				



STRATEGIC PATH 2 CAPSBC branding (continued)

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	2.4 Publicize the agency's measurable outcomes in appropriate documents such as the Annual Report.	Administration/ Operations	Partner agencies, Media, Businesses	Year 1—ongoing

*Community Action  
changes people's lives,  
embodies the spirit of  
hope, improves communi-  
ties and makes America  
a better place to live.  
We care about the entire  
community and we are  
dedicated to helping  
people help themselves  
and each other.*



setting our course

## STRATEGIC PATH 3 policy advocacy

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>3.1</b> Ensure that advocacy for low-income people is a key message in the CAPSBC marketing campaign, policies and advocacy efforts.	Administration/ Operations	Community	Year 1—ongoing
		●	●					
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>3.2</b> Expand staff capacity to conduct research and review current national, state and local policy information that affect low-income people.	Administration/ Operations	Other CAAs, local universities	Year 2
		●	●	●				
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>3.3</b> Define the Board's role in advocacy and partner with the Board members to engage in a variety of specific annual advocacy activities.	Administration Community Action Board	Other private CAA Boards	Year 1
		●	●	●				

## STRATEGIC PATH 4 programs and services

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>4.1 Assess existing CAPSBC programs and services for alignment with the agency mission and identity, and re-evaluate program investments accordingly.</b>	Operations	Community colleges, local universities, evaluation consultant	Year 1
●								
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>4.2 Create new CAPSBC programs and collaborate with partners to expand services that align with the agency mission focusing on self-sufficiency</b>	Operations	School districts, community colleges, local universities, health care charities, private foundations	Year 2–3
●								
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>4.3 Use state and national best practices as models to build and strengthen CAPSBC programs and services.</b>	Operations	Other CAA's, local universities	Year 1
●								

setting our course

STRATEGIC PATH 4 programs and services (continued)

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	4.4 Each program will develop its own measurable outcomes and objectives	Operations Planner	State Department of Community Services and Development (DCSD)	Year 1
●								



For 40 years,  
CAPSBC has  
dedicated its efforts  
to advocate for the  
low-income people in  
San Bernardino  
County.

## STRATEGIC PATH 5 funding

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	5.1 Build on successful programs by creating for-profit ventures to increase CAPSBC funding.	Administration/ Operations Weatherization	Business, Economic Development Dept., Corporations Consultant	Year 3
●		●	●	●				
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	5.2 Hire a Development Director to oversee fund development and grant-writing efforts.	Administration/ Operations	Recruitment Agencies	Year 1
			●	●				
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	5.3 Strengthen Board leadership in fundraising activities such as an annual fundraising event that the Board members can actively participate in.	Administration	State Association, other CAAs	Year 1
		●	●	●				

setting our course

## STRATEGIC PATH 6 performance measurement

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>6.1</b> Create an agency-wide data management system to track the accomplishment of outcome indicators with return on investment.	Administration	State, other CAA, technology vendors	Year 1
		●		●				
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>6.2</b> Provide education on the ROMA outcomes and indicators for CAPSBC staff and the Board, as well as training, including tracking and evaluating data.	Administration	State Department of Community Services and Development (DCSD), ROMA Trainers, State Associations	Year 1
				●				
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>6.3</b> Provide opportunities for CAPSBC staff to actively participate in the State Task Force.	Administration	State Department of Community Services and Development (DCSD)	Year 1
				●				

## STRATEGIC PATH 7 staff engagement

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	7.1 Create a staff incentive program that provides rewards for good work.	Administration/ Operations	Local universities, Outside consultant	Ongoing
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	7.2 Develop relevant, appropriate on-going staff training with opportunities for cross-training.	Administration/ Operations	Local community colleges, H.R. consultants	Year 1–Ongoing
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	7.3 Create and implement an agency-wide communications plan that stresses the agency's core values.	Administration/ Operations	PR consultant, Universities	Year 1–Ongoing

setting our course

## STRATEGIC PATH 8 board development and structure

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	8.1 Evaluate existing Board membership and if necessary expand or modify.	Administration & Board		Year 1
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	8.2 Create advisory boards to provide program specific expertise and develop future Tripartite Board members.	Administration & Board		Year 1
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	8.3 Evaluate the organization of the Board committees and create or eliminate to realign with current needs of CAPSBC.	Administration & Board		Year 1



## STRATEGIC PATH 8 board development and structure *(continued)*

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	8.4 Strengthen Board capacity to engage in fundraising activities.	Administration & Board	Consultant	Year 1
		●	●	●				

## STRATEGIC PATH 9 organizational infrastructure

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	9.1 Increase staffing with emphasis on technology and case management.	Operations	H.R. consultant Technology consultant	Year 1–3
				●				

choosing the most strategic path

## STRATEGIC PATH 9 organizational infrastructure *(continued)*

goals					strategies	agency lead	key partners	time frame
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>9.2 Upgrade IT system and ensure compatibility with programs and services.</b>	Administration	SB County Information and Technology Services Department (ITSD), Outside vendors	Year 1–Ongoing
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>9.3 Connect with existing efforts to create information and referral technology to better link CAPSBC clients to programs and services available throughout the community.</b>	Administration/ Operations	Other Information Referral System, United Way's 211 project	Year 5 +
FOCUSED PROGRAMS	ACCESS	VISIBILITY	ADVOCACY	ORGANIZATIONAL CAPACITY	<b>9.4 Develop a centralized intake, standardized assessment and case management process to track all clients (no matter what CAPSBC program they initially access), ensuring that clients referred to services are successfully linked to those services. (e.g., MOUs and shared tracking forms with partner organizations).</b>	Administration/ Operations	County ISD Outside vendors	Year 3

## OUTCOMES AND OBJECTIVES

Outcomes describe the results CAPSBC seeks to create for its clients. Each goal has a specific outcome. Objectives are targets used to measure the outcomes and goals.

### Goal 1 Focused Programs

**CAPSBC focuses its programs and services to address critical barriers to self-sufficiency for low-income people.**

#### Outcome

The San Bernardino County community is healthier because CAPSBC programs and services are focused on providing opportunities for low-income individuals to achieve self-sufficiency through partnerships with the local communities.

#### Objectives

**1.1** Seventy percent of programs directly eliminate one or more barriers (financial, emotional, physical, etc.) to self-sufficiency.

**1.2** Each year an increasing number of low-income people become self-sufficient.

### Goal 2 Access

**Low-income people in San Bernardino County can access the broad range of services they need to achieve stability and become more self-sufficient.**

#### Outcome

Low-income individuals throughout San Bernardino County have direct and easy access to services in spite of geography, language or other barriers.

#### Objectives

**2.1** CAPSBC has a centralized intake process.

**2.2** Increase in percentage of staff is linked to comprehensive information about services throughout the County.

**2.3** There is a percentage per year increase in new CAPSBC referral agreements.

**2.4** At least one CAPSBC service is co-located in each of the regions.

### Goal 3 Visibility

**Low-income people, partner organizations, policy makers and the general public are knowledgeable about CAPSBC's mission and services.**

#### Outcome

CAPSBC is known as the primary organization for self-sufficiency for low-income individuals in San Bernardino County.

#### Objectives

**3.1** Staff shares and understands the CAPSBC vision and mission allowing them to promote the CAPSBC branding with the entire community.

**3.2** CAPSBC increases the number of audiences reached through the branding campaign.

### Goal 4 Advocacy

**CAPSBC is recognized throughout cities and communities of San Bernardino County as a strong and effective advocate for low-income people.**

#### Outcome

CAPSBC leadership and advocacy results in increased resources, partnerships and understanding of the needs of low-income people in San Bernardino County.

#### Objectives

**4.1** CAPSBC has increased the number of relationships with local school districts and developed relationships with policy makers from each of the 24 cities in San Bernardino County.

**4.2** CAPSBC increases the membership of Boards that it sits on.

**4.3** CAPSBC has established effective measures at local, state and national levels.

**4.4** State and local policy makers routinely consult CAPSBC when considering policies, programs and funding for low-income people.

## setting our course

### Goal 5 Organizational Capacity CAPSBC has enhanced organiza- tional capacity to support its clients to achieve self-sufficiency.

#### Outcome

The CAPSBC staff provides increasingly effective programs and services as a result of improved management systems, increased funding, consistent training and active participation from the Board of Directors.

#### Objectives

**5.1** Board members are actively engaged in organizational activities.

**5.2** Board members are actively participating/meeting with public/elected officials.

**5.3** Increase in percentage of staff completing appropriate specific training.

**5.4** Portion of organizational focus on increasing number of low-income people served through effective programs.

**5.5** A percentage of staff has criteria for evaluating programs.

**5.6** Increase in percentage of staff with access to technology.

**5.7** CAPSBC has established five new non-government funding sources.

### MEASURING OUR SUCCESS

#### ROMA-Performance Measures

Results Oriented Management and Accountability (ROMA) is an approach to management that builds accountability into the daily activities of employees and the daily operations of an organization. ROMA is an avenue for organizations to continually evaluate the effectiveness of their programs and plot a course for improvements in agency capacity and performance. ROMA is also the common language for members of the Community Action Network to use to respond to the Government Performance and Results Act (GPRA) of 1993, which requires that federally funded programs demonstrate measurable outcomes.

The following areas and indicators will be used by the CAPSBC to measure its outcomes.

#### Agency Development

- Mission Integration
- Self-Sufficiency Impact
- Community Development Impact
- Client Satisfaction
- Planning and Evaluation

- Cultural Sensitivity and Competence
- Staff Development and Staff Morale
- Governance
- Collaboration and Partnerships
- Fund Development and Leverage
- Fiscal Administrative Health

#### Community Development

- Public Policy
- Equity
- Civic Capital
- Service and Support Systems
- Economic Opportunity

#### Family Development

- Shelter
- Food and Nutrition
- Transportation and Mobility
- Health
- Social/Emotional Health and Competence
- Income Budget
- Family Relations/Parenting
- Community Involvement
- Adult Education and Development

- Youth Education and Development

The benchmarks that are used to measure success for each of the indicators include:

**Thriving** – Characterizes success.

**Safe** – Participants play a significant role.

**Stable** – Represents an atmosphere midway between “crisis” and “thriving.”

**Vulnerable** – There may be visible change but participation is low.

**In-Crisis** – Represents a state of conflict and hostility.

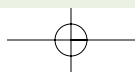
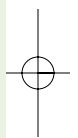
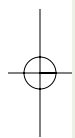
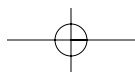
#### EVALUATING AND UPDATING OUR PLAN

The Strategic Plan provides direction and strategies for organizational change, helping CAPSBC fulfill its mission to support low-income residents of San Bernardino County. The plan will not only drive the agency forward, but also establish community awareness, involvement, and support for carrying out the plan.

The strategies outlined in the Strategic Plan and the actions will help the organization reach the desired outcomes, goals and objectives. A significant step in the implementation phase will be to evaluate and update the Strategic Plan. The CAPSBC will establish a process for regular review of progress that includes annual assessment and updating.

*The plan will not only drive the agency forward, but also establish community awareness, involvement and support for carrying out the plan.*







# environmental scan

community action partnership of san bernardino county  
**STRATEGIC PLAN**



*The environmental scan  
included both data  
collection and analysis, as  
well as input from staff,  
clients and stakeholders.*



environmental scan  
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# environmental scan

## executive summary

### INTRODUCTION

The Community Action Partnership of San Bernardino County (CAPSBC) is developing a Strategic Plan that will guide the organization for the next five years. In the first phase of the planning process, CAPSBC worked with its strategic planning consulting team—Moore Iacofano Goltsman, Inc. (MIG)—to conduct an environmental scan to better understand the context in which the organization is planning and operating. The scan included both data collection and analysis, as well as input from staff, clients and stakeholders. This report summarizes the major themes that emerged from the environmental scan activities (see Appendix F for findings from each of the participatory scan activities).

#### CAPSBC Overview

The Community Action Partnership of San Bernardino County (CAPSBC) is a private, non-profit public benefit corporation. CAPSBC is the designated Community Action Agency for San Bernardino County and is one of the

1,100 Community Action Agencies nationwide dedicated to assisting low-income individuals and families become stable and self-reliant.

CAPSBC serves over 800,000 residents in 78 San Bernardino cities and communities each year. Programs include:

- Family Development
- Food Bank
- Food Stamp Employment and Training
- Energy Conservation/Weatherization;
- Nutrition for Seniors
- Inland Empire Individual Development Accounts
- Homeless Coalition

#### Strategic Planning Process

The twelve-month strategic planning process has three phases (see Appendix A for a graphic representation of the strategic planning process):

- Phase One: Environmental Scan (February through July 2004)
- Phase Two: Priority Selection and Goal Development (August 2004)
- Phase Three: Strategy and Overall Plan Development (September through March 2005)

#### *Environmental Scan Activities*

The following activities were undertaken during the environmental scan phase:

- CAPSBC Management Team Desired Outcomes exercise (see Appendix F for findings)
- Twenty confidential stakeholder interviews (see Appendix B for the Stakeholder Interview Questionnaire; see Appendix F for interview findings)
- CAPSBC Strategic Planning Advisory Committee Strengths, Weaknesses, Opportunities and Threats (SWOT) exercise (see Appendix B for SWOT questions and Appendix F for findings)

- CAPSBC Board SWOT exercise (see **Appendix B** for SWOT questions and **Appendix F** for findings)
- Needs and Opportunities Corps facilitated small group discussions, Questionnaires and Summit (see **Appendix B** for the Community Questionnaire and **Appendix F** for Summit findings)
- Staff Values and Opportunities Workshop (see **Appendix B** for Staff Values and Opportunities Workshop Questionnaire and **Appendix F** for findings)
- Review of existing community needs assessments developed locally (see **Appendix C** for a bibliography of the community needs assessments reviewed)
- Review of articles on recent national and statewide trends in public welfare (see **Appendix E** for a bibliography of the trends analysis)
- Focus Groups with CAPSBC clients and potential strategic partners (see **Appendix B** for the Focus Group Questionnaires and **Appendix F** for Focus Group findings)

### Report Organization

This report is organized into four main sections:

Section I: Assessing the Needs of the Community We Serve

Section II: Understanding the Trends in Our Environment

Section III: Reflecting on the State of the Organization

Section IV: Shaping Our Priorities

### SECTION I: ASSESSING THE NEEDS OF THE COMMUNITY WE SERVE

The first section presents an overview of the primary needs of low-income residents in San Bernardino County. This summary was developed by reviewing and analyzing: 1) data from existing San Bernardino community needs assessments (see **Appendix C** for a bibliography of the community needs assessment reviewed); 2) findings from Community Questionnaires that were completed by CAPSBC client groups or providers who serve low-income residents in San Bernardino County; and 3) input provided through facilitated discussions with CAPSBC staff and partners.

According to these sources, primary needs of low-income San Bernardino County residents include:

- Affordable Housing
  - Home Ownership
  - Rental Market (utility assistance and rental assistance)
  - Homelessness
- Financial Stability
  - Poverty Rates
  - Concentrated Poverty
  - Income
- Employment and Training
  - Employment Opportunities
  - Access to Higher Education
  - Language Skills
- Access to Health and Dental Care
  - Health Care Access
  - Outreach and Education
- Food and Nutrition
- Accessible and Reliable Transportation
- Information on Available Services and Resources
- Affordable Child Care
- Substance Abuse Services
- Family Support Services

## executive summary

### SECTION II: UNDERSTANDING THE TRENDS IN OUR ENVIRONMENT

This section provides an overview of the major national and state trends in public welfare, as well as the challenges and opportunities that exist locally. This analysis is intended to help CAPSBC understand the realities and challenges in its environment, and to identify new opportunities that could benefit the organizations and its clients.

#### Trends in Public Welfare

The following summary of national and state trends is based on a review of recent journal articles, as well as MIG's experience in these fields (see **Appendix E** for a bibliography of the trends analysis).

#### Overall Trends

The trends that have transformed public welfare over the last decade are likely to continue and intensify in the coming years. The central trend has been a shift from cash assistance to the promotion of economic self-sufficiency, a policy goal that has been implemented in a range of areas, including poverty-prevention, homelessness, housing, and child

welfare. Policy makers have increasingly emphasized approaches that rely on families, the private economy, and community institutions as the key supports for achieving economic independence and personal responsibility. At the same time, demands to improve business practices and declining public budgets have resulted in streamlined delivery models and a greater emphasis on demonstrating the results of government programs.

These policy trends are not likely to change, as there is a strong consensus around the concepts of supporting clients to work, self-sufficiency, and efficiency in public service. The ongoing state fiscal crises have intensified this overall trend, while creating severe challenges to securing the significant resources needed to successfully implement the new approaches. This broad change encompasses several themes that are likely to characterize the future environment for public and non-profit service providers:

- Encouraging Work
- Transitional Assistance
- Streamlining

- Community and Inter-Agency Partnerships
- Encouraging Two-Parent Families
- Conflicts and Adjustments

#### *Trends in California*

California has experienced all of the trends described previously, and has been viewed by some as leader in welfare reform. California's expenditures clearly demonstrate the shift in focus from providing direct cash assistance to requiring and providing assistance in obtaining gainful employment. There has been a decrease of almost 50% in expenditures on cash assistance programs since mid-1990s, while spending on employment services and child care has increased almost five-fold. MediCal has also been broadened and its caseload increased.

In California, as in many other states, deficits at the state level will continue to dramatically affect public welfare programs in the short-to-medium term. Assuming that the State's fiscal crisis will not have a quick resolution, a continued weak economy will not only reduce program-spending levels, it will decrease the discretionary revenue that the state needs to

adopt innovative strategies. As a result of these trends, the State has made significant cuts to county health and human services programs that have deleteriously affected access to and quality of existing services.

Federal policy changes are also constraining California's public welfare system. Federal policy changes are estimated to have cost the state \$21 billion in past 4 years. As a specific example, loss of federal support for housing in past eight years has resulted in a loss of more than 26,000 affordable housing units as landlords converted subsidized units to market rents.

### **The San Bernardino Experience**

To supplement and enhance the review of national and state-wide trends, CAPSBC engaged its staff and partners in reviewing the challenges that exist in the local environment and identifying new opportunities. The following key themes emerged:

#### **Opportunities**

- New strategic partnerships
- CAPSBC visibility
- Expanded, diversified funding

#### **Challenges**

- Scarce funding for services and supports
- Uncertain political climate
- Increasing community need for assistance

### **SECTION III: REFLECTING ON THE STATE OF OUR ORGANIZATION**

This section highlights key themes related to CAPSBC strengths, as well as strategic areas that the organization may want to pursue in the future. This analysis is intended to help CAPSBC understand its core strengths, as well as areas where new or continued investment would be beneficial to its overall organizational functioning.

#### **Areas of Strength**

- Effective leadership
- Dedicated, experienced staff
- Collaborations and connections
- Diverse, outstanding programs
- Stable funding

#### **Areas to Pursue**

- Expansion of programs and services
- Increased partnerships and collaborations
- Alignment of programs with mission
- Enhanced performance measurement
- Improved internal communication

### **SECTION IV: SHAPING OUR PRIORITIES**

This final section presents the overall themes that consistently emerged from the environmental scan activities that may help to inform CAPSBC's strategic priorities. The CAPSBC Management Team and the Strategic Planning Advisory Committee will reflect on these findings, as well as all of the themes that surfaced through the environmental scan activities, as they choose their strategic plan priorities.

- Expand strategic partnerships
- Increase CAPSBC visibility
- Augment program and services
- Maximize funding opportunities
- Enhance performance measurement
- Improve internal communication

# environmental scan

## introduction

The Community Action Partnership of San Bernardino County (CAPSBC) is developing a Strategic Plan that will guide the organization for the next five years. In the first phase of the planning process, CAPSBC worked with its strategic planning consulting team—Moore, Iacofano, Goltsman, Inc. (MIG)—to conduct an environmental scan to better understand the context in which the organization is planning and operating. Specifically, the objectives of the scan were to reveal: 1) the needs and service gaps for San Bernardino County's low-income residents; 2) the strengths and challenges within the organization itself; and 3) the forces of change in the broader community. The scan included both data collection and analysis, as well as input from staff, clients and stakeholders. This report summarizes the major themes that emerged from the environmental scan activities (see **Appendix F** for findings from each of the participatory scan activities).

### CAPSBC OVERVIEW

The Community Action Partnership of San Bernardino County (CAPSBC) is a private, non-profit public benefit corporation. CAPSBC is the designated Community Action Agency for San Bernardino County and is one of the 1,000 Community Action Agencies nationwide dedicated to assisting low-income individuals and families become stable and self-reliant. Formerly known as the Community Services Department, CAPSBC was established in 1965 as a result of the Economic Opportunity Act (EOA) of 1964. The EOA was signed into law by President Lyndon B. Johnson to support his declaration of an unconditional "war on poverty."

CAPSBC's primary objectives are:

- To plan, develop and implement programs designed to alleviate poverty;
- To function as an advocate for the poor; and

- To build community self-sufficiency and dignity for low-income people.

CAPSBC serves over 800,000 residents in 78 San Bernardino cities and communities each year. The organization provides services to low-income families and individuals, elderly persons, and homeless and disadvantaged residents. Programs include:

- Family Development
- Food Bank
- Food Stamp Employment and Training
- Energy Conservation/Weatherization
- Nutrition for Seniors
- Inland Empire Individual Development Accounts
- Homeless Coalition

### STRATEGIC PLANNING PROCESS

The 12-month strategic planning process has three phases (see

**Appendix A** for a graphic representation of the strategic planning process):

- **Phase One: Environmental Scan** (February through July 2004)

- Develop a baseline of information and input to assess the current state of CAPSBC and the “environment” in which it operates.

- **Phase Two: Priority Selection and Goal Development** (August 2004)

- Reflect on the findings from the environmental scan to re-examine the organization’s mission, prioritize key issues, and develop goals.

- **Phase Three: Strategy and Overall Plan Development** (September through March 2005)

- Facilitate a Strategic Plan Retreat with CAPSBC staff and Board members to review and refine goals, develop key strategies, and define indicators of organizational performance.
- Prepare the Strategic Plan Document.

### Environmental Scan Activities

The following activities were undertaken during the environmental scan phase:

- The CAPSBC Management Team

was engaged in an exercise to identify the outcomes they desired from the Strategic Plan. (See **Appendix F** for findings.)

- Twenty confidential interviews were conducted with key agency and community representatives to assess strategic issues and challenges facing CAPSBC. (See **Appendix B** for the Stakeholder Interview Questionnaire and **Appendix F** for interview findings.)
- Strengths, Weaknesses, Opportunities and Threats (SWOT) analyses were facilitated with the Strategic Planning Advisory Committee (SPAC), the CAPSBC Board and with the CAPSBC staff at a Staff Values and Opportunities Workshop. The SWOT assessments identified issues and challenges facing CAPSBC and assessed assets, opportunities and trends. (See **Appendix B** for SWOT Exercise Questions and Staff Values and Opportunities Workshop Questionnaire and **Appendix F** for findings from these activities.)
- The Needs and Opportunities Corps—a group of approximately 30 volunteers—facilitated small group discussions and distributed

questionnaires. Their efforts assisted CAPSBC to confirm the needs of low-income individuals living in the County, as well as identify assets and opportunities that CAPSBC could build on to best assist low-income residents in achieving self-sufficiency. Following their data collection activities, Corps members gathered at a Summit to share what they learned and provide input on CAPSBC priorities. (See **Appendix B** for Community Questionnaire and **Appendix F** for findings from the Summit.)

- Existing community needs assessments developed locally were gathered and summarized. (See **Appendix C** for a bibliography of the community needs assessment reviewed.)
- Articles on recent national and statewide trends in public welfare were reviewed and synthesized. (See **Appendix E** for a bibliography of the trends analysis.)
- Focus Groups with CAPSBC clients and potential strategic partners (see **Appendix B** for the Focus Group Questionnaires and **Appendix F** for Focus Group



## introduction

findings) were held to further explore emerging priorities and potential strategies for addressing those issues.

### REPORT ORGANIZATION

This report is organized into four main sections:

#### **Section I: Assessing the Needs of the Community We Serve**

The first section of the report presents an overview of the primary needs of low-income residents in San Bernardino County. This summary was developed by reviewing and analyzing: 1) data from existing San Bernardino community needs assessments; 2) findings from Community Questionnaires that were completed by CAPSBC client groups or providers who serve low-income residents in San Bernardino County; and 3) input provided through facilitated discussions with CAPSBC staff and partners.

#### **Section II: Understanding the Trends in Our Environment**

The second section of the report is presented in two parts. The first is a summary of overall trends in public welfare across the County and in California. The second reports the key themes related to local opportunities and challenges from the SPAC and Board SWOT analyses, the Stakeholder Interviews, the Staff Values and Opportunities Workshop, and the Needs and Opportunities Corps Summit.

#### **Section III: Reflecting on the State of the Organization**

The third section of the report highlights key themes related to CAPSBC strengths, as well as areas that the organization may want to pursue further in the future. The findings presented were drawn from the SPAC and Board SWOT analyses, the Stakeholder Interviews, the Staff Values and Opportunities Workshop, and the Needs and Opportunities Corps Summit.

#### **Section IV: Shaping Our Priorities**

The final section of the report presents the overall themes that consistently emerged from the environmental scan activities that may help to inform CAPSBC's strategic priorities. The CAPSBC Management Team and the Strategic Planning Advisory Committee will reflect on these findings, as well as all of the themes that surfaced through the environmental scan activities, as they choose their strategic plan priorities.



# environmental scan

## section 1 assessing needs

The first section presents an overview of the primary needs of low-income residents in San Bernardino County. This summary was developed by reviewing and analyzing: 1) data from existing San Bernardino community needs assessments (see **Appendix C** for a bibliography of the community needs assessment reviewed); 2) findings from Community Questionnaires that were completed by CAPSBC client groups or providers who serve low-income residents in San Bernardino County; and 3) input provided through facilitated discussions with CAPSBC staff and partners (See Tables 1, 2, and 3 on pages 12, 13, and 14 for a description of where questionnaires were distributed or meetings facilitated and a breakdown of the findings; see **Appendix D** for additional findings sorted by respondent city).

### OVERVIEW OF NEEDS

The following is an overview of the primary needs indicated by existing

community needs assessments and the recent Needs and Opportunities Corps data collection effort (e.g., Community Questionnaires and facilitated discussions).

### Affordable Housing

Barriers to home ownership, lack of access to the rental market, and homelessness emerged as key housing issues in the County. The median home price increased 26% from January 2002 to January 2004 (Homeless Census Survey). A person making minimum wage would have to work 83 hours a week to be able to afford the fair market value of a 2-bedroom rental apartment at \$729/month (United Way), and an estimated 14,861 to 23,549 people are homeless at some point in a given year (Homeless Census Survey). The findings from the Community Questionnaire validate this reality. Respondents identified “affordable housing” as both the most critical need (64% of 932 respondents) and the primary gap in service (58% of 932 respondents).

Additional housing statistics are presented below.

### Home Ownership

- In 2001, 49% of Inland Empire households could afford to buy the median-priced home in their area, as compared to 57% nation-wide (United Way).
- 29% of respondents to the 2003 United Way survey, 47% of Asian respondents, and 35% of residents of Central San Bernardino reported that they lacked adequate access to affordable housing.
- Seniors and adults with disabilities participating in the County-wide forums held by Aging and Adult Services identified a need for more assistance for home repair and maintenance.<sup>1</sup>

<sup>1</sup> 2,212 seniors and adults with disabilities participated in forums convened by the Department of Aging and Adult Services over a 5-month period across the County.

## assessing needs

### Rental Market

- In 2000, 43% of renter households paid more than 30% of their income on rent (Homeless Census Survey).
- Participants in County-wide forums held by Aging and Adult Services identified a need for more affordable housing, and pointed out that most affordable housing developed is built for single families.
- Participants in County-wide forums held by Aging and Adult Services also identified having a live-in care provider as a major barrier to maintaining affordable housing as these providers affect the reported household income (and therefore income eligibility) and Section 8 eligibility.
- 43% of all respondents to the Community Questionnaire identified "rental assistance" as a critical need (one of the top five responses), whereas even higher rates of respondents from Fontana (66%) and Colton (53%) identified "rental assistance" as a critical need.
- 37% of respondents to the Community Questionnaire identified "utility assistance" as a critical need (one of the top five responses)

and whereas 53% of respondents from the city of San Bernardino identified this need.

- Respondents to the Community Questionnaire from Rialto and Highland identified affordable housing (73%, 65% respectively), rental assistance (60%, 50% respectively), and utility assistance (50%, 45% respectively) as critical needs at higher rates than the overall response rates presented above. 73% of respondents from Rialto also identified "affordable housing" as a service gap, compared to an overall response rate of 58%.

### Homelessness

- Key identified needs in the CAPSBC homeless census survey include housing for veterans and the mentally ill; long-term or permanent housing; domestic violence services; case management and supportive services; transitional programs for youth; emergency beds; and even distribution of shelter beds across the County.
- 44% of overall United Way respondents reported that homelessness was a major problem, with residents in the Central San Bernardino and

High Desert regions (over 50%) as well as Black (69%) and Hispanic (49%) residents reporting the greatest degree of concern.

- Participants in the County-wide forums held by Aging and Adult Services identified a need for emergency and transitional housing for seniors and adults with disabilities (Aging and Adult Services.)
- Residents from Redlands, Ontario, and San Bernardino who participated in the Community Service Department's 2003 Public Hearings<sup>2</sup> identified the need for increased emergency and transitional housing programs to address the continuing challenges of homelessness.

### Financial Stability

High poverty rates continue to challenge the County. The percentage of County residents living below the poverty level rose from 12.7% in 1990 to 15.8% in 2000, which exceeds both the State and national rates (Poverty Population Report). Existing assessments provide some illustration

<sup>2</sup> 87 individuals participated in 6 public hearings held in May 2003 across the County to provide feedback to the Community Services Department about needs particular to various low-income communities.

of the extent of poverty and which County residents are hit hardest:

### **Poverty Rates**

- In 2000, 40% of all County households lived below 80% of the median area income (Homeless Census Survey).
- In 2000, 35% of White households, 49% of Black households, 50% of Hispanic households and 36% of "Other" households lived below 80% of the area median income (Homeless Census Survey).
- The greatest increases in poverty rates since 1990 were experienced by children and youth. The percentage of all children under 5 living below the poverty level increased from 19.1% to 23.5% from 1990 to 2000, and similar increases were seen in the 5 to 11 age group and 12 to 17 age group. (Poverty Population Report).

### **Concentrated Poverty**

- Census tracts where the number of very low-income households (those living at or below 50% of the area median income) makes up at least 50% of all households included

North Colton and Colton (Homeless Census Survey).

- The Cities of Barstow, Adelanto, and San Bernardino reported the highest percentage of residents on cash aid in 2003 (12%, 13%, and 14% respectively, with all other cities reporting 9% or less) (Human Services System).
- The overall percentage of residents receiving any government aid was 15.2% in 2003, but the percentages were 28% in Barstow, 31% in Adelanto, and 32% in San Bernardino (Human Services System).

### **Income**

- Median income for full-time male workers exceeded that of females by approximately \$10,000 and both were lower than the State average (Poverty Population Report).
- In 2000, 24% of County residents reported an income of less than \$25,000, compared to 21% State-wide, and in 2002 approximately 45% of households in the Inland Empire reported an income of less than \$35,000 (Indicators Report).

### **Employment and Training**

More opportunities for employment are a primary concern of San Bernardino residents. Currently, the County-wide unemployment rate (8.3%) exceeds that of the State (7%). "Jobs and employment" was the second most common need identified by Community Questionnaire respondents (57% of 932 respondents), while "education and training programs" was one of the most common service gaps identified (35%).

Areas where residents need more support include employment opportunities, access to higher education, and assistance with language skills:

### **Employment Opportunities**

- 60% of all United Way respondents, 78% of Black respondents and 67% of Hispanic respondents reported that unemployment or underemployment were major problems.
- The growth of high-skilled and high-paying jobs has not kept pace with the overall job and population growth in the County (Consolidated Plan).
- Black respondents to the United Way survey and residents of Central

## assessing needs

San Bernardino and the Desert Regions reported a lack of employment opportunities at much higher rates than the County-wide average.

### **Access to Higher Education**

- Approximately one-third of all respondents to the United Way survey, 57% of Black respondents, and 41% of Hispanic respondents reported that they did not have access to affordable colleges or vocational schools.
- In 2000, the County ranked 42nd of all 58 California Counties in terms of percentages of adults over the age of 25 that are not high school graduates.
- Respondents to the Community Questionnaire from Fontana and Highland identified "jobs and employment" (66%, 32% respectively) and "education and training" (70%, 40% respectively) as critical needs at disproportionately high rates. The overall response rates for these needs were 57% for "jobs and employment" and 29% for "education and training."
- Although the overall response rate to the Community Questionnaire for identifying "education and training"

ing" as a critical service gap was 35%, the response rate from respondents in Colton was 47%.

### **Language Skills**

- In 2001, 11% of all County households, and over 20% of Hispanic households and 22% of Asian households have no member over the age of 14 that spoke English "very well" (United Way).
- 25% of all respondents to the United Way survey reported that someone in their family had trouble with the English language and 45% reported that illiteracy was a major concern.

### **Access to Health and Dental Care**

Existing needs assessments indicate that a lack of access to affordable health and dental care are significant issues for County residents. Community Questionnaire respondents confirm these findings, identifying this issue as both a critical need (38% of respondents) and a service gap (37%).

### **Health Care Access**

- Of all respondents to the 2003 United Way survey:

- 14.3% of children in the County lacked continuous health care in 2001;
- 30% of overall respondents, 41% of Hispanic respondents, and 42% of residents of Morongo Basin reported that they did not have access to affordable health insurance; and
- 30% of overall respondents reported that their family did not have affordable medical care.

The First 5 and United Way needs assessments also identified the following specific needs:

- Affordable, coordinated, and comprehensive health care and health insurance for children, youth and their parents, and all adults, especially those who do not qualify for public assistance, do not receive health care coverage through work, and cannot afford to pay for a health care plan.
- Transportation to health care services.
- Services for families of and children with special health care needs, particularly in the High Desert, Mountain, and East Valley.
- Access to dental care in the Mid-Desert and Central Valley.

- Access to Ob/Gyn services in the Mid-Desert and Mountain regions.
- Convenient and quick access to emergency services.
- Readily available and guaranteed “specialized” health care services for children, such as vision, dental, and mental health care.

County-wide forums held by Aging and Adult Services also found that access to health care services is a primary concern for seniors and adults with disabilities:

- There is a need for increased access to medical facilities, emergency services, and affordable long-term care (e.g. adult day health care services). This need is compounded in rural areas.

### ***Outreach and Education***

The First 5, Molina Health Care, Health Status Profile, and United Way needs assessments identified the following specific needs:

- Culturally appropriate health care services, such as a better representation of the County’s diversity in health care staff and more readily available multi-lingual services,

especially in the High Desert, West End, East Valley

- Multi-lingual outreach and education about existing health care services.
- Research, understanding, and integration of immigrant populations’ traditional perspectives on and uses of health and health care.
- Education and support concerning mental health issues for children and youth.
- Education for families regarding accident prevention and other childhood illnesses.
- Knowledge and awareness of what services exist for families of children with special health care needs, especially in the High Desert, Mid Desert, Mountain regions.

Specific gaps in services are evidenced by the key health status indicators presented below, which reflect discrepancies across demographics regarding health and access to health care.

- The teen birth rate amongst Latinas was 108 per 1,000 teens in 2001, but 40 per 1,000 teens overall (United Way).

- In the Morongo Basin, 14% of families report that they lack access to immunizations for their children, whereas the County-wide percentage is 6% (United Way).
- Type II diabetes is a growing problem and 41% of all people with diabetes in the Inland Empire are Latino (United Way).
- 65% of respondents to the Community Questionnaire from Colton identified “affordable health and dental” as a critical service gap—a much higher rate than the overall response rate of 37%.

### **Food and Nutrition**

The San Bernardino County Department of Public Health Nutrition (DPHN) found that due to the vast geographic size of San Bernardino County, the financial burdens that many residents face, and the lack of frequent and reliable transportation in rural and low-income communities, food insecurity is a major barrier for many families across the County. Food insecurity occurs when individuals and communities are unable to procure food through normal channels such as grocery stores, gardens, or farmers

## assessing needs

markets, or are at-risk for hunger<sup>3</sup> (Food Security Report).

Key findings outlined in DPHN's 1998 Food Security Report<sup>4</sup> include:

- California ranks in the top 10 of the most "food insecure" States
- In San Bernardino County, there are an estimated 238,000–400,000 people experiencing food insecurity, based upon the degree of poverty present in San Bernardino County and the DPHN's calculation of what it would require to be self-sufficient (the minimum amount of money needed to meet a family's basic needs) in San Bernardino County.
- Food insecurity is high in the Desert and Mountain regions of the County where access to

grocery stores is poor, public transportation is minimal, and poverty rates are higher than other areas.

- Food insecurity was also found to be high in the High Desert and Valley regions due to the lack of food assistance programs in those areas where poverty rates are higher than other regions and public transportation services are minimal.
- In addition to affordability of food, lack of transportation across the County was found to be a primary barrier to accessing grocery stores and emergency food providers.

County-wide forums held by Aging and Adult Services indicate that maintaining adequate nutrition is a primary concern for seniors and adults with disabilities in the County as well:

- Many areas that are heavily populated with seniors (such as the Mountain region) have no senior nutrition programs.
- Congregate meal services need to be advertised more broadly across the County and opened up to adults under 60 with disabilities (not just seniors).

- With an increasing number of senior citizens, home-delivery meal programs need to be expanded as well (Aging and Adult Services).

The feedback gathered from both the Community Questionnaire and the Community Service Department's 2003 Public Hearings supports the above findings and indicates that concerns about food and nutrition are felt more in certain regions of the County:

- Although overall 33% of respondents to the Community Questionnaire identified "food and nutrition programs" as a critical need and 29% identified this as a service gap, 50% of respondents from Highland identified this as a need and service gap.
- Residents from Barstow, Fontana, San Bernardino, and Ontario commented on the need for more outreach and information regarding food distribution programs, increased numbers of food banks, and more outreach about senior nutrition programs (CSD Public Hearings).

<sup>3</sup> Food security, on the other hand, is defined as "Access by all people at all times to enough food for an active, healthy life and includes at a minimum: 1) the ready availability of nutritionally adequate and safe foods, and 2) the assured ability to acquire acceptable food in socially acceptable ways (e.g. without resorting to emergency food supplies, scavenging, stealing and other coping strategies).

<sup>4</sup> Other than the 2003 CAPSBC Public Hearings, this is the most recent data available on food and nutrition needs in the County.



### Accessible and Reliable Transportation

A safe, accessible, and affordable means to work, school, or other appointments is reported as a key barrier in the County. Multiple assessments have identified a need for transportation that: 1) is more frequent, affordable, and universally accessible; 2) is accessible to all existing, new, and rural residential neighborhoods; and 3) connects families and seniors with health care services (First 5, IERC Annual Survey, Indicators Report, United Way, Aging and Adult Services). This gap is evidenced by other findings as well:

- 21% of overall United Way respondents and 42% of Black respondents reported that someone in their family did not have transportation to get to school, work, or a doctor;
- In 2000, 1.9% of County residents commuted by public transportation while 91% commuted by car, truck, or van (Indicators Report); and
- In an annual County-wide survey of public and private services, "transportation" continued in 2003 to be the lowest ranked service, along with street maintenance (IERC Annual Survey).

- In County-wide forums held by Aging and Adult Services, inaccessible, inconvenient, and poorly equipped transportation was found to be a primary concern for seniors and adults with disabilities. Those in rural areas such as the High Desert and Mountain regions and those needing access to medical services most often expressed this.

Transportation was also one of the most commonly identified service gaps by Community Questionnaire respondents (36% of all 932 respondents) and was identified as a barrier to accessing job centers and medical services by residents of Ontario and Joshua Tree (CSD Public Hearings).

### Information on Available Services and Resources

Many County residents are struggling to access the information they need to find supportive services in the County. Existing assessment report the following:

- 31.4% of respondents to the 2003 United Way survey indicated that their household does not have enough information about social services in their region.
- 27.7% of respondents who looked for assistance reported that no

assistance was found, most often because of lack of eligibility (United Way).

- Substantial portions of residents (at least 20%) with children age 10 years or younger that responded to the Inland Empire Research Consortium 2003 San Bernardino County Annual Survey reported that:

- They were not aware of parenting classes or parenting groups in their area;
- They would not know where to seek help if they had concerns about their child's development;
- They would not know where to find information about children's mental health issues;
- They have never heard of First 5 or the Child and Family Commission; and
- In all of these areas, the lack of knowledge or awareness of services was expressed most frequently by East Valley residents.

Community Questionnaire respondents echoed these sentiments, identifying "information about services and resources" as both a critical need (33% of respondents) and a service gap (32%) in the County.

## assessing needs

### Affordable Child Care

As the numbers of families with both parents in the workforce increases and CalWORKS work requirements become more stringent, the demand for child care is increasing. Findings from existing studies demonstrate how acute the demand for child care is:

- The County ranked 57 of all 58 counties in 2001 for its supply of licensed child care slots as measured against demand and estimated need (Indicators Report).
- Availability in child care centers and family child care homes met only 15% of the demand in the Inland Empire in 2001, with a severe shortage for children under 24 months old (Indicators Report).
- The median Inland Empire income rose 7% between 1999 and 2001, while infant care costs rose 20% and preschool care costs rose 13% (Indicators Report).
- The most common reason cited by respondents to the United Way survey who needed but could not access child care was "could not afford any".

The First 5 needs assessment identified the following specific needs:

- Access to more licensed child care and preschool facilities for all children.
- Available, high-quality, and affordable child care and preschool, especially for families that do not qualify for subsidies but cannot afford market-rate child care, and families in the High Desert, West End, Mid Desert, Central Valley, Mountains, and East Valley.
- Access to affordable child care and preschool for Black and Asian families, who responded at disproportionately high rates in the United Way survey that there is not enough affordable preschool or child care in the County.
- Child care for children birth to three, particularly in the High Desert, West End, and Central Valley regions.
- Child care for children with special health care needs in the Mid Desert and Central Valley.
- Strengthened standards and available training for child care providers and early educators.

### Substance Abuse Services

Substance abuse can contribute to family instability, homelessness, and employment barriers. Existing assessments report that the incidence of substance abuse is quite high in the County.

- San Bernardino County ranked 4th in the State in 2001 in terms of drug- and alcohol-related arrests (United Way).
- San Bernardino County leads the nation in numbers of methamphetamine manufacturing labs found in 2001, and the presence of "meth labs" is increasingly reported as a problem (United Way).
- "Drug problems" continue to be mentioned as a serious problem across the County (IERC Annual Survey).

### Family Support Services

Family support services are another critical need that surfaced in existing assessments. Findings from these studies show that families are struggling with abuse and neglect and domestic violence:

- In 2001, 47% of all United Way respondents and 57% of Black



respondents (the highest response rate) reported that child abuse and neglect happened in their community and over 50% of respondents living in the Central San Bernardino, High Desert, and Morongo Basin regions reported that abuse and neglect was a major problem.

- The rate of referrals to the Department of Children's Services for suspected child abuse for children under 8 years has increased the most of all age groups since 1999 (Children's Network Annual Report).
- White and Hispanic children comprised approximately 34% each of all children referred, whereas Black comprised 16% of all children referred (Children's Network Annual Report).
- Referrals to the Rancho Cucamonga and San Bernardino offices made up 55% of all referrals in 2002 (Children's Network Annual Report).
- The most common form of senior/elder abuse was found to be "self-abuse", with the greatest risks being lack of physical care, inadequate

medical care, exposure to health and safety hazards, social isolation, and mental impairment (United Way).

- Reports of elder abuse increased 5% from 1999-2000 (Aging and Adult Services)
- 47% of all United Way respondents felt domestic violence was a major problem in their community, and over 50% of Black respondents, low-income respondents, and respondents living in the Central San Bernardino, High Desert, and Morongo Basin regions reported that domestic violence was a major problem.

#### NEEDS AND OPPORTUNITIES CORPS DATA COLLECTION RESULTS

Overall, a total of 932 Needs and Opportunities Corps Community Questionnaires were completed and returned and one facilitated discussion was held with the Homeless Coalition Next Steps Task Force. Total responses and response rates for each question in the survey are listed in Table 1, "CAPSBC

Needs and Opportunities Corps Questionnaire: Overall Findings."

The Community Questionnaires were distributed to low-income residents, existing CAPSBC clients or providers who work with these populations at several locations across the County, as Table 2 (Questionnaire Distribution Points) and Table 3 (Response Rates by City) demonstrate. As Table 2 shows, many of the Community Questionnaires were gathered from clients of HEAP, FDP Rental Assistance, Head Start, and Public Health. Table 3 lists the response rates for the four cities from which the most responses were gathered: San Bernardino, Fontana, Rialto, and Highland. Response rates from other cities across the County are found in Appendix D.

## assessing needs

**TABLE 1** CAPSBC Needs and Opportunities Corps Questionnaire:  
Overall Findings

QUESTION 1-A: MOST CRITICAL NEEDS	Number of Respondents	% of Respondents
Information about resources & services	306	33%
Affordable Housing	593	64%
Rental Assistance	399	43%
Utility Assistance	349	37%
Shelter-Emergency	164	18%
Shelter-Transitional	102	11%
Food & Nutrition Programs	308	33%
Education & Training Programs	268	29%
Jobs/Employment	528	57%
Family support services	139	15%
Affordable health & dental care	353	38%
Affordable mental health services	84	9%
Mental Health assistance	81	9%
Affordable child care	244	26%
Accessible & reliable transportation	201	22%
Legal assistance	144	15%
QUESTION 1-B: CRITICAL SERVICE GAPS	Number of Respondents	% of Respondents
Information about resources & services	294	32%
Affordable housing	537	58%
Shelter	183	20%
Food & Nutrition Programs	271	29%
Education & Training Programs	322	35%
Family support services	177	19%
Affordable health & dental care	345	37%
Affordable mental health services	107	11%
Affordable child care	252	27%
Transportation	331	36%
Legal assistance	216	23%
Services for particular population groups groups	97	10%
Services for particular ethnic or cultural groups	73	8%
<b>TOTAL NUMBER OF RESPONDENTS</b>	<b>932</b>	

**TABLE 2 CAPSBC Needs and Opportunities Corps Questionnaire: Questionnaire Distribution Points<sup>5</sup>**

Survey Location	Number of Respondents
Home Energy Assistance Program (HEAP)	310
Family Development Program (FDP) Rental Assistance	75
Head Start	64
Public Health	62
Food Stamp Employment & Training	47
Inland Temporary Homes	31
New Hope for Children, Families, and Community Conference	26
Project REACH/Pricilla's Helping Hands	25
Inland Empire Job Corps Center	19
Colton Somos Hermanas	19
Cinco de Mayo Health Fair	16
Libreria del Pueblo	15
Department of Children's Services	14
Homeless Provider Network	14
Volunteer Parish Nurses	11
North Colton Hutton Senior Center	10
Fontana SOAR District Site	10
North Fontana Jun Ave 7th Day Adventist	9
Focus West	9
Highland City San Andreas High School	7
South Colton Peter Luque Senior Center	7
Inland Behavioral Health Systems	6
Rancho Cucamonga Summit Church	4
Neighbors	4
Big Bear Collaborative	3
CWSSAT	2
Policy Consortium	1
East Valley Collaborative	1

<sup>5</sup> Because not every questionnaire indicated where it was distributed, these numbers do not total 932.

## assessing needs

**TABLE 3 CAPSBC Needs and Opportunities Corps Questionnaire:  
Response Rate by City<sup>6</sup>**

QUESTION 1-A: MOST CRITICAL NEEDS	Fontana	% of Fontana	Highland	% of Highland
Information about resources & services	11	29%	4	20%
Affordable housing	25	66%	13	65%
Rental assistance	25	66%	10	50%
Utility assistance	14	37%	9	45%
Shelter-emergency	1	3%	3	15%
Shelter-transitional	1	3%	1	5%
Food & nutrition programs	12	32%	10	50%
Education & training programs	12	32%	9	45%
Jobs/employment	25	66%	10	50%
Family support services	4	11%	4	20%
Affordable health & dental care	16	42%	3	15%
Affordable mental health services	2	5%	1	5%
Mental health assistance	1	3%	0	0%
Affordable child care	13	34%	4	20%
Accessible & reliable transportation	7	18%	2	10%
Legal assistance	8	21%	6	30%
<b>QUESTION 1-B: CRITICAL SERVICE GAPS</b>				
Information about resources & services	13	34%	6	30%
Affordable housing	21	55%	11	55%
Shelter	5	13%	1	5%
Food & nutrition programs	13	34%	10	50%
Education & training programs	16	42%	9	45%
Family support services	6	16%	3	15%
Affordable health & dental care	11	29%	5	25%
Affordable mental health services	3	8%	1	5%
Affordable child care	14	37%	3	15%
Transportation	10	26%	6	30%
Legal assistance	8	21%	4	20%
Services for particular population groups	0	0%	2	10%
Services for particular ethnic/cultural groups	3	8%	2	10%
<b>TOTAL RESPONDENTS</b>	<b>38</b>		<b>20</b>	

<sup>6</sup> Table 3 lists the response rates for the four cities where the majority of the questionnaire respondents reside: San Bernardino, Fontana, Rialto, and Highland. Response rates from other cities across the County are found in Appendix D.

## CAPSBC Needs and Opportunities Corps Questionnaire: Overall Findings continued

Rialto	% of Rialto	San Bernardino	% of San Bernardino
15	50%	56	37%
22	73%	89	59%
18	60%	71	47%
15	50%	80	53%
3	10%	27	18%
0	0%	9	6%
7	23%	50	33%
9	30%	41	27%
19	63%	91	61%
5	17%	14	9%
8	27%	48	32%
3	10%	7	5%
6	20%	7	5%
7	23%	33	22%
3	10%	27	18%
4	13%	22	15%
8	27%	58	39%
22	73%	80	53%
5	17%	23	15%
7	23%	40	27%
12	40%	54	36%
4	13%	24	16%
7	23%	52	35%
4	13%	12	8%
8	27%	29	19%
7	23%	49	33%
4	13%	37	25%
1	3%	6	4%
5	17%	3	2%
<b>30</b>		<b>150</b>	

In addition, because not every respondent indicated the city in which he or she resides, these numbers (including those found in Appendix D) do not total 932.

# environmental scan

## section ii understanding the trends in our environment

This section provides an overview of the major national and state trends in public welfare, as well as the challenges and opportunities that exist locally. This analysis is intended to help CAPSBC understand the realities and challenges in its environment, and to identify new opportunities that could benefit the organizations and its clients.

### TRENDS IN PUBLIC WELFARE

The following summary of national and state trends is based on a review of recent journal articles, as well as MIG's experience in these fields (see Appendix D for a bibliography of the trends analysis).

#### Overall Trends

The trends that have transformed public welfare over the last decade are likely to continue and intensify in the coming years. The central trend has been a shift from cash assistance to the promotion of economic self-sufficiency, a policy goal that has been implemented in a range of

areas, including poverty-prevention, homelessness, housing, and child welfare. Policy makers have increasingly emphasized approaches that rely on families, the private economy, and community institutions as the key supports for achieving economic independence and personal responsibility. At the same time, demands to improve business practices and declining public budgets have resulted in streamlined delivery models and a greater emphasis on demonstrating the results of government programs.

These policy trends are not likely to change, as there is a strong consensus around the concepts of supporting work, self-sufficiency, and efficiency in public service. The ongoing state fiscal crises have intensified this overall trend, while creating severe challenges to securing the significant resources needed to successfully implement the new approaches. This broad change encompasses several themes that are likely to characterize the future envi-

ronment for public and non-profit service providers:

#### *Encouraging Work*

Efforts to encourage workforce participation are clearly evident in the Transitional Assistance for Needy Families program (TANF), where participants are directed to seek quick entry into the labor force. In addition to this "push" strategy, some federal and state policies have created financial incentives to "pull" people into the economy. These policies include the creation of the State Children's Health Insurance program, increases in resources for child care for working families, restructuring of the food stamp program to benefit working families, and increases in the minimum wage. Similarly, some states increased the amount of earnings welfare recipients could retain while receiving the same level of public benefits. The Earned Income Tax Credit, a refundable tax credit to low-income workers and key anti-poverty program, has been expanded over the years. This trend is

still strong: in 2002, Federal mandates increased work participation requirements, required work activity sooner and restricted definitions of “work activity.”

### ***Transitional Assistance***

As seen most clearly in TANF, a strong trend is to limit the duration of services, supporting the central policy goal of economic self-sufficiency. In addition to the shift to temporary cash assistance, time limits have been applied to supportive housing, child care subsidies, and other social services. The increased emphasis on child support enforcement transitions the burden of financial support to a permanent source of income within the family.

### ***Streamlining***

There has been a sustained emphasis of process and quality improvement, customer-service and strategic planning, as seen in the Government Performance and Results Act and similar state initiatives. Although welfare programs have not been systematically streamlined or coordinated at the federal level, states have the flexibility to coordinate eligibility, application, and enrollment

processes across programs (e.g., TANF, Food Stamps, child care) and have begun to do so. This was encouraged by the 2002 restructuring of Food Stamps, which allowed greater flexibility in the application and enrollment process.

A trend has been to create a single, transparent system. States have used the flexibility allowed in administering federal programs to align and streamline program rules across programs so that families who are eligible for multiple programs experience fewer barriers and states experience fewer administrative burdens. Examples include streamlining of eligibility requirements and paperwork, creating a single review process for all programs, reducing office visit requirements, and sharing of information and client profiles across programs.

### ***Community and Inter-Agency Partnerships***

Government agencies are increasingly partnering with one another and with community-based groups, such as non-profit organizations, faith communities, schools, and businesses to secure resources and deliver services. The trends toward partnership and away from govern-

ment as the sole provider of services can be seen in the decline in the number of public housing units, and the corresponding increase in the use of Section 8 subsidies for rental of private units.

### ***Encouraging Two-Parent Families***

In past 10 years, each state adopted at least one policy change designed to strengthen marriages and two-parent households. While there are many interests involved in this policy shift, the main policy justification has been that two-parent families are more likely to be economically self-sufficient and less likely to need cash assistance than single-parent families. Supporters also include researchers who find positive developmental, psychological, and emotional outcomes related to two-parent families. Areas where changes have been made include marriage and divorce laws, family programs and services, and TANF regulations and policies. Since 2001, the Federal Administration for Child and Families has committed \$90 million in grants for demonstration programs, technical assistance, and research and evaluation regarding “healthy” marriage.

## understanding the trends in our environment

### *Conflicts and Adjustments*

The change to a work and self-sufficiency oriented policy framework has created challenges:

- Conflicts and competing requirements between TANF (work requirements) and services mandated by the child welfare system (e.g., court appearances, frequent visits).
- Participation in Medicaid declined drastically due to decreased participation in welfare; around the turn of the century these rolls started increasing again due to massive outreach efforts by States.

### **TRENDS IN CALIFORNIA**

California has experienced all of the trends described previously, and has been viewed by some as leader in welfare reform. For example, expenditures on child welfare services increased approximately 20% from 1998-2000, while CalWORKS caseloads decreased at least 10% annually from its inception in 1998 to 2001. Until 2002, California was one of most generous states in its implementation of TANF, allowing the highest income cut-off of all states and

permitting children to remain on assistance long after parents no longer qualify. Another indicator of success is California's high proportion of child-only welfare recipients, which is due to its flexibility in covering children and its coverage for non-citizen children. CalWORKS also allowed participants to count as "work activity" their attendance at community colleges for 18-24 months.

California's expenditures clearly demonstrate the shift in focus from providing direct cash assistance to requiring and supporting gainful employment. There has been a decrease of almost 50% in expenditures on cash assistance programs since mid-1990s, while spending on employment services and child care has increased almost five-fold. MediCal has also been broadened and its caseload increased.

### *Looking Ahead for California*

In California, as in many other states, deficits at the state level will continue to dramatically affect public welfare programs in the short-to-medium term. While the state is currently viewed as being on an upturn, the expected duration of the state's

weak economy not only reduces program-spending levels, but also decreases the discretionary revenue that the state needs to adopt innovative strategies.

Reducing state spending also results in the loss of federal dollars in several programs, including Food Stamp, In-Home Supportive Services and Medi-Cal (California Budget Project). But recent policy changes at the federal level are constraining California's public welfare system as well. Federal policy changes are estimated to have cost the state \$21 billion in past 4 years. As a specific example, loss of federal support for housing in past eight years has resulted in a loss of more than 26,000 affordable housing units as landlords converted subsidized units to market rents. This represents 18% of the state's inventory of federally assisted units. Reducing state spending results in the loss of federal dollars in several programs, including Food Stamp, In-Home Supportive Services and Medi-Cal (California Budget Project).

According to a recent publication of the California Budget Project, the



## understanding the trends in our environment

State's budget crisis has had the following consequences for health and human service programs throughout the State and in San Bernardino:

- The State has not provided funds to offset rising County operating expenses. In San Bernardino County, retirement costs rose by 104 percent, short-term disability costs by 292 percent, and worker's compensation costs by 222 percent between 2001–02 and 2003–04.
- In response to overhead cuts, Counties have had to reduce spending and staffing levels. Alameda, Contra Costa and San Bernardino counties reported the largest layoffs, primarily affecting CalWORKs Program staff.
- The State has reduced funding for county-run health and human service programs, including Medi-Cal, CalWORKs, Child Welfare, Food Stamps, and Adult Protective Services.
- The State has increased the counties' share of responsibility for programs, including Adult Protective Services, Child Welfare, Foster Care and In-Home Supportive Services.
- Counties have reduced outreach efforts for both CalWORKs and Food Stamps Programs as a result of funding cuts. Counties also reported a reduction in the number of places individuals can apply for food stamps.
- Counties have also reported changes resulting from budget cuts are undermining the overall quality of services and their ability to provide preventive services. San Bernardino County reported that limited contact with client in the In-Home Supportive Services Program has put the frail elderly at risk of deterioration to the point of needing out-of-home placement.
- Counties have cut or been unable to implement innovative education and training, job retention and advancement, transportation assistance, housing assistance and family service programs. By eroding counties' ability to implement high-quality, innovative program models, funding cuts may result in a decline in public support for vital public services.

### State and County Responses

The changing policy environment has inspired a range of innovations and new initiatives at the state and local level. Unfortunately, many of these innovations may be compromised by continued funding reductions (California Budget Project). Key examples include:

- Through the Healthy Families Program, California has **expanded health care coverage** to low-income families beyond Federal requirements. By accessing many and diverse funding streams, the state has been able to cover children, youth, and parents at much higher income levels than required by the Federal mandate.
- In response to Welfare reform, states have enacted **creative benefits**, such as disregarding cars and other assets and higher income disregards, balanced with sanctions such as requiring immediate work activity to achieve program goals.
- States and counties conducted massive **outreach for Medicaid and Food Stamps**, targeting former welfare recipients who lost eligibility.

## understanding the trends in our environment

- **County public welfare and child welfare** divisions are working more closely to coordinate case management services for families (California Center for Research on Women and Families, CalWORKs/Child Welfare Partnership Project).
- **Living Wage Campaigns** and other local economic development strategies have been pursued to reverse polarization of wages (Center for Labor Research & Education, UC Berkeley).
- California **Child Welfare Services Redesign** (CWS Redesign) is an ambitious overhaul of California's child welfare system. At the state and local level, public child welfare agencies are implementing changes to their systems to ensure safety, permanency and well being for children and youth. The principles underlying the Redesign emphasize community partnerships, inter-agency coordination, family and youth involvement, workforce excellence, and accountability.

### THE SAN BERNARDINO EXPERIENCE

To supplement and enhance the review of national and state-wide trends, CAPSBC engaged its staff and partners in reviewing the challenges that exist in the local environment and identifying new opportunities. The key themes that emerged from the SPAC and Board SWOT analyses, the Stakeholder Interviews, the Staff Values and Opportunities Workshop, and the Needs and Opportunities Corps Summit are presented below.

#### Opportunities

##### *New Strategic Partnerships*

- Target new businesses coming to San Bernardino
- Partner with faith-based services, which are increasing in number
- Partner with existing community-based organizations to leverage expertise and community connections
- Link with Child Welfare Redesign efforts

#### *CAPSBC Visibility*

- Expand marketing and public education efforts to articulate the value of our services
- Increase outreach in areas with population growth (desert population shifts)

#### *Expanded, Diversified Funding*

- Track outcomes to appeal to government and private funders that are increasingly interested in funding research-based, outcomes-based organizations
- Maximize funding opportunities through new, nonprofit status
- Expand into for-profit areas (e.g., weatherization) to subsidize more programs

#### Challenges

##### *Scarce Funding for Services and Supports*

- Reductions in State and Federal funding for services and programs
- Competition for scarce funds

#### *Uncertain Political Climate*

- Less support among policy makers and the general public for helping low-income residents
- Lack of policies that support poverty programs

#### *Increasing Community Need for Assistance*

- Population growth overall and in outlying areas
- Increased cost of housing
- Demand for services outpacing supply—affordable housing, child care, education and transportation
- Increased number of persons without any resources (e.g., rising homelessness and poverty)

*The changing policy environment  
has inspired a range of innovations  
and new initiatives at the state  
and local level.*

# environmental scan

## section iii reflecting on the state of our organization

This section highlights key themes related to CAPSBC strengths, as well as strategic areas that the organization may want to pursue in the future. The findings presented were drawn from the SPAC and Board SWOT analyses, the Stakeholder Interviews, the Staff Values and Opportunities Workshop, and the Needs and Opportunities Corps Summit. This analysis is intended to help CAPSBC understand its core strengths, as well as areas where new or continued investment would be beneficial to its overall organizational functioning.

### AREAS OF STRENGTH

#### *Effective Leadership*

- Excellent Board leadership
- Strong executive direction, dedication and commitment
- Sound fiscal accountability

#### *Dedicated, Experienced Staff*

- Experienced and knowledgeable
- Responsive and sincere
- Effective in addressing client needs
- Strong advocate for the poor
- Work well within constraints

#### *Collaborations and Connections*

- Ability to pull people and agencies together
- Connected to many service providers
- Good reputation within the community

#### *Diverse, Outstanding Programs*

- Providing a wide range of programs and services to the poor
- Delivering quality case management and referrals

#### *Stable Funding*

- Securing a stable base of funding

- Successfully leveraging funds with other organizations

### AREAS TO PURSUE

#### *Expansion of Programs and Services*

- Expand the number of people reached through existing programs and services
- Extend services to outlying communities
- Increase staffing levels/build organizational capacity

#### *Increased Partnerships and Collaborations*

- Create new partnerships with a range of public, community-based and private organizations and groups to strengthen and expand services
- Increase partnerships to reduce duplication of services and leverage resources

reflecting on the state of our organization

#### ***Alignment of Programs with Mission***

- Develop programs that respond to community needs within the context of the organization's mission
- Prioritize and target programs to reach organizational goals

#### ***Enhanced Performance Measurement***

- Advocate performance measurement that gauges the effectiveness and in-depth impact of our programs rather than simply looking at numbers served

#### ***Improved Internal Communication***

- Enhance communication and coordination across agency programs
- Create more forums for ongoing communication
- Create communication tools that work for everyone, regardless of their access to technology

*Working at CAPSBC we are able to make a difference in our community by using our individual expertise to work together to have immediate impact on the lives of those we serve.*

# environmental scan

## section iv shaping our priorities

This final section presents the overall themes that consistently emerged from the environmental scan activities that may help to inform CAPSBC's strategic priorities. In this process, strategic priorities are defined as new and fundamental opportunities to enhance the organization's success in accomplishing its mission. These opportunities will have impacts on the organization or its clients in the short term (1 to 3 years) and will take significant effort to craft a solution.

The CAPSBC Board, Management Team and the Strategic Planning Advisory Committee will reflect on these findings, as well as all on the themes that surfaced through the environmental scan activities, as they choose their strategic plan priorities.

- **Strategic Partnerships:** Create new strategic partnerships, particularly with community-based, grassroots groups; the business community; educational institutions and other government-funded agencies that serve the same population to

strengthen and expand services to CAPSBC clients.

- **CAPSBC Visibility:** Expand CAPSBC marketing and outreach to policy makers, partner organizations, funders, potential client groups and the general public.
- **Program and Services:** Increase the number of people reached through CAPSBC services by increasing staffing levels, expanding existing services to outlying communities, and creating new programs to address service gaps. Gaps that surfaced as the most critical for CAPSBC clients included:
  - affordable housing;
  - employment and job training opportunities;
  - affordable health care; and
  - transportation.

Other major gaps noted were services for outlying areas and services for adults between the ages of 18 and 50 who do not have children.

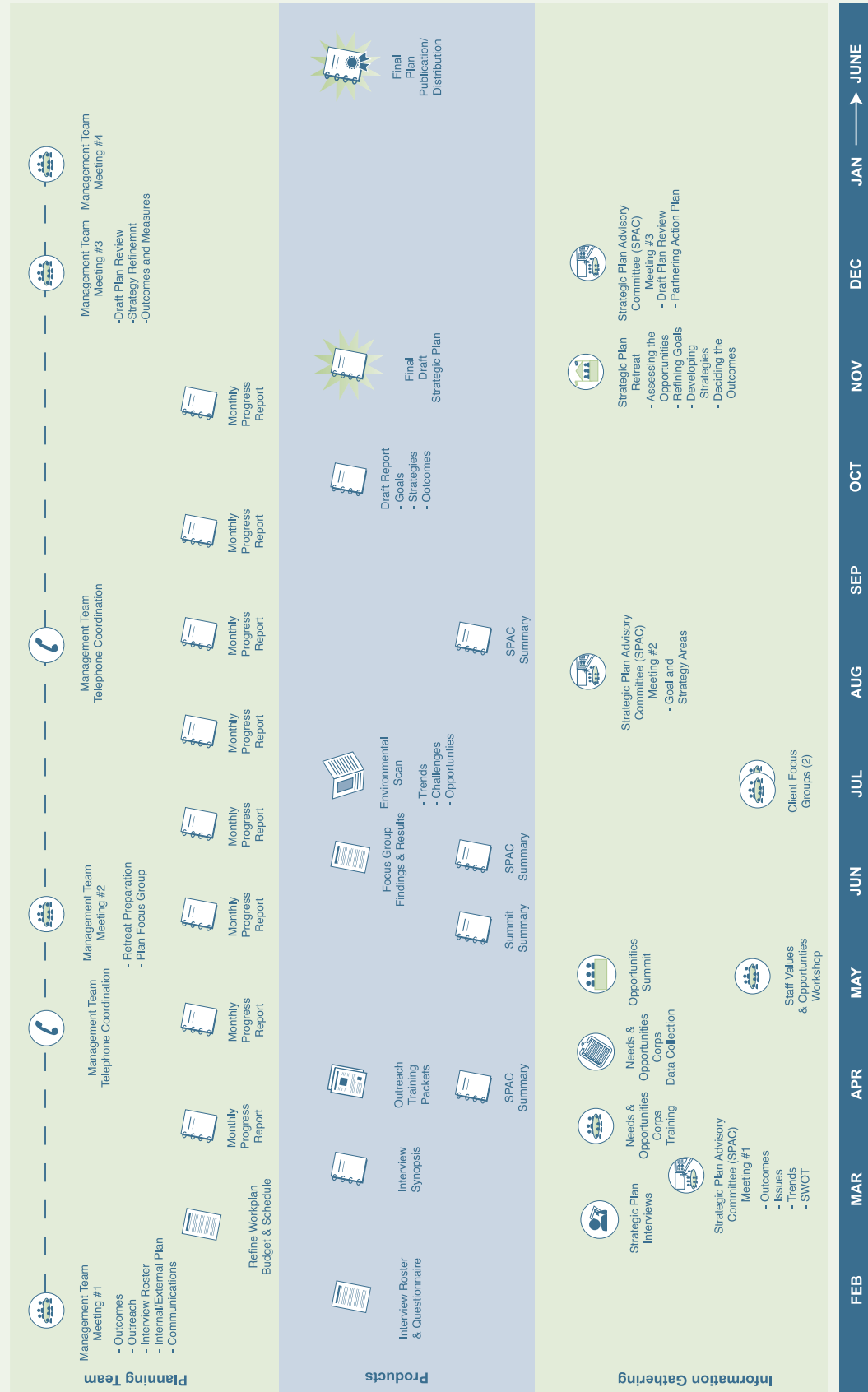
- **Funding:** Expand and diversify funding to sustain existing and

develop new programs that respond to community needs within the context of the organization's mission.

- **Performance Measurement:** Create a performance measurement system that gauges the real impact of CAPSBC programs for its clients.
- **Internal Communication:** Create more forums and accessible tools for ongoing communication within and across agency programs.

# environmental scan

## appendix A strategic plan timeline



# environmental scan

## appendix b data collection instruments

### STAKEHOLDER INTERVIEW QUESTIONNAIRE

1. What is your relationship with the Community Action Partnership of San Bernardino County (CAPSBC)? (For example: partner, funding source, adviser, etc.)
2. Are you familiar with CAPSBC's mission and core programs? (If not, what is your understanding of CAPSBC's programs and services)?
3. What do you think are CAPSBC's greatest strengths?
4. Are there any areas in which you believe the organization could improve?
5. What are the strengths and weaknesses of CAPSBC's current relationship with you? Are there ways that your relationship could be enhanced or strengthened?
6. Are there ways in which CAPSBC can better serve its customers? What suggestions do you have for CAPSBC in reaching their customers and obtaining their input?
7. Are there any major issues that you believe have the potential to affect CAPSBC success in the next three to five years (probe: threats and opportunities)?
  - Threats?
  - Opportunities?
8. How do you think CAPSBC is perceived in the community?
9. What do you think is CAPSBC's impact on the low-income community in San Bernardino County?
10. What do you believe should be CAPSBC's major program priorities?
11. Is there anything else you'd like to add?

Thank you!



**STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS EXERCISE QUESTIONS**

1. What are CAPSBC's major strengths as an organization?
2. In what areas, if any, could CAPSBC be improved or strengthened?
3. What external opportunities currently exist (or will exist in the next three years) that could enhance CAPSBC's success as an organization?
4. What external threats or challenges are currently facing CAPSBC (or may be in the next three years) that could hinder CAPSBC's success as an organization?
5. Based on your responses above, what are the three to five most important issues that CAPSBC should tackle in its strategic planning effort?

**COMMUNITY QUESTIONNAIRE**

The Community Action Partnership of San Bernardino County (CAPSBC) is the designated Community Action Agency for San Bernardino County and is one of the 1,100 Community Action Agencies nationwide dedicated to assisting low-income individuals and families become stable and self-reliant.

CAPSBC is developing a strategic plan that will guide the organization for the next five years. Through the strategic planning process, we are striving to solicit input from our staff, our clients and our stakeholders. Specifically, CAPSBC would like to know what you believe are the most critical needs of low-income individuals living in the County, as well as what assets and opportunities exist in San Bernardino that CAPSBC could build on to best assist low-income residents in achieving self-sufficiency.

**Instructions: Please take the time to complete this brief questionnaire and return it to the person who asked you to fill it out no later than March 10, 2004.**

1. In your opinion, what are the 3–5 most critical needs or service gaps for low-income residents in San Bernardino County?

**A. Needs (check 3 to 5 choices):**

- ☐ Information about resources and services
- ☐ Affordable housing
- ☐ Rental assistance

## data collection instruments

**COMMUNITY QUESTIONNAIRE**

- ☐ Utility assistance
- ☐ Shelter–Emergency
- ☐ Shelter–Transitional
- ☐ Food and nutrition programs
- ☐ Education and training programs
- ☐ Family support services (classes, support groups, etc.)
- ☐ Affordable health and dental care
- ☐ Affordable mental health services
- ☐ Mental health assistance
- ☐ Affordable child care
- ☐ Accessible and reliable transportation
- ☐ Legal assistance
- ☐ Other (please list)\_\_\_\_\_
- ☐ Other (please list)\_\_\_\_\_
- ☐ Other (please list)\_\_\_\_\_

Additional Comments:

**B. Service Gaps (check 3 to 5 choices):**

- ☐ Information about resources and services
- ☐ Affordable housing
- ☐ Shelter
- ☐ Food and nutrition programs

**COMMUNITY QUESTIONNAIRE**

- ☐ Education and training programs
- ☐ Family support services (classes, support groups, etc.)
- ☐ Affordable health and dental care
- ☐ Affordable mental health services
- ☐ Affordable child care
- ☐ Transportation
- ☐ Legal assistance
- ☐ Services for particular population groups

If you check the box above, please tell us which groups you believe are underserved:

---

- ☐ Services for particular ethnic or cultural groups

If you check the box above, please tell us which groups you believe are underserved:

- ☐ Other (please list)\_\_\_\_\_
- ☐ Other (please list)\_\_\_\_\_
- ☐ Other (please list)\_\_\_\_\_

Additional Comments:

2. Are there significant assets for the low-income population in the County that CAPSBC should be aware of (check all that apply)?

- ☐ Excellent programs or services (please list)
- ☐ Effective advocates or advocacy groups (please list)

## assessing needs

### COMMUNITY QUESTIONNAIRE

- ☐ Supportive policy makers (please list)
- ☐ Other assets (please list)
- 3. Are there opportunities that CAPSBC should take advantage of to best assist their clients in achieving self-sufficiency?
  - ☐ Funding opportunities (please list)
  - ☐ Partnerships with other organizations (please list)
  - ☐ Other opportunities (please list)

Thank you for taking the time to complete this questionnaire!

### STAFF VALUES AND OPPORTUNITIES WORKSHOP QUESTIONNAIRE

Please provide brief answers to the following questions. Please bring this questionnaire with you to the meeting. All questionnaires will be kept confidential.

Thank you!

#### **Mission**

- What are the main responsibilities of the Community Action Program of San Bernardino County (CAPSBC)?
- What would CAPSBC customers say CAPSBC is best at?
- What are CAPSBC employees' core competencies—what do they do better than anyone else?
- What are CAPSBC's core competencies as an agency? What does it do better than anyone else?

## STAFF VALUES AND OPPORTUNITIES WORKSHOP QUESTIONNAIRE

### Personal and Organizational Values

- Finish these sentences...
  - People can be trusted to behave in a responsible way when....
  - People will contribute to their full potential when...
  - People will cooperate and work together effectively when...
  - People will take initiative when....
  - CAPSBC employees are at their best when...
  - CAPSBC relationship to its customers is...
  - CAPSBC relationship to its customers should be...
- What do you think our organization has assumed about people in the past?
- How does the organization assume people will behave?
- Do you agree with these? Would they be in place if this were your organization to run?
- What would you change?
- What do CAPSBC employees do best?

## CLIENT FOCUS GROUP QUESTIONNAIRE

Please provide brief answers to the questions below. All individual responses will be kept confidential.

Thank you!

- What CAPSBC programs have you utilized?
- How have CAPSBC programs assisted you?
- What, if anything, would you change about CAPSBC programs?
- What services would you like to see CAPSBC provide?

## assessing needs

### CLIENT FOCUS GROUP QUESTIONNAIRE

- What kinds of services would most help you with the following needs:
  - Affordable housing?
  - Employment and job training?
  - Affordable health care?
  - Reliable transportation?
  - Child care?
- What methods would work best to inform you and other San Bernardino residents about our services?

### PARTNER FOCUS GROUP QUESTIONNAIRE

Please provide brief answers to the questions below. All individual responses will be kept confidential.

Thank you!

- What strategies should CAPSBC use to engage the following new partners in assisting low-income residents in achieving self-sufficiency (please provide responses for the groups listed below with whom you are the most familiar):
  - Business community?
  - Educational institutions?
  - Foundations?
  - The media?
- In your experience, what are some of the ways that the groups below could partner with agencies or organizations like the CAPSBC (please provide responses for the groups listed below with whom you are the most familiar)?
  - Business community?
  - Educational institutions?
  - Foundations?
  - The media?
- Is your organization interested in or open to developing a partnership with CAPSBC? If so, what steps can CAPSBC take to initiate this partnership?

**PARTNER FOCUS GROUP QUESTIONNAIRE**

- Do you know of any specific organizations (e.g., private businesses, educational institutions, faith-based organizations, the media or foundations) that may be interested in or open to developing a partnership with CAPSBC?
- What strategies are most effective in leveraging existing resources or securing new resources?
- Are you aware of local funding opportunities for organizations that provide support to low-income individuals?
- What methods should CAPSBC use to reach new partners with information about the organization's services?
- What services should CAPSBC be providing for low-income San Bernardino County residents?

# environmental scan

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# environmental scan

## appendix d needs and opportunities

### corps questionnaire: response rates by city

QUESTION 1-A: MOST CRITICAL NEEDS	Adelanto	% of Adelanto
Information about resources & services	3	60%
Affordable Housing	4	80%
Rental Assistance	4	80%
Utility Assistance	3	60%
Shelter-Emergency	0	0%
Shelter-Transitional	0	0%
Food & Nutrition Programs	1	20%
Education & Training Programs	2	40%
Jobs/Employment	3	60%
Family support services	1	20%
Affordable health & dental care	2	40%
Affordable mental health services	0	0%
Mental Health assistance	0	0%
Affordable child care	0	0%
Accessible & reliable transportation	0	0%
Legal assistance	0	0%
QUESTION 1-B: CRITICAL SERVICE GAPS	Number of Respondents	% of Respondents
Information about resources & services	2	40%
Affordable housing	2	40%
Shelter	1	20%
Food & Nutrition Programs	1	20%
Education & Training Programs	2	40%
Family support services	2	40%
Affordable health & dental care	3	60%
Affordable mental health services	0	0%
Affordable child care	1	20%
Transportation	2	40%
Legal assistance	0	0%
Services for particular population groups	0	0%
Services for particular ethnic or cultural groups	0	0%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>5</b>	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Alta Loma	% of Alta Loma
Information about resources & services	1	50%
Affordable Housing	1	50%
Rental Assistance	0	0%
Utility Assistance	1	50%
Shelter-Emergency	0	0%
Shelter-Transitional	0	0%
Food & Nutrition Programs	0	0%
Education & Training Programs	1	50%
Jobs/Employment	1	50%
Family support services	0	0%
Affordable health & dental care	1	50%
Affordable mental health services	0	0%
Mental Health assistance	1	50%
Affordable child care	0	0%
Accessible & reliable transportation	0	0%
Legal assistance	1	50%
QUESTION 1-B: CRITICAL SERVICE GAPS		
Information about resources & services	1	50%
Affordable housing	1	50%
Shelter	0	0%
Food & Nutrition Programs	1	50%
Education & Training Programs	1	50%
Family support services	1	50%
Affordable health & dental care	0	0%
Affordable mental health services	1	50%
Affordable child care	1	50%
Transportation	0	0%
Legal assistance	0	0%
Services for particular population groups	1	50%
Services for particular ethnic or cultural groups	0	0%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>2</b>	

## needs and opportunities corps questionnaire

Apple Valley	% of Apple Valley	Bloomington	% of Bloomington
2	50%	0	0%
2	50%	2	100%
2	50%	1	50%
2	50%	1	50%
1	25%	0	0%
1	25%	0	0%
2	50%	0	0%
1	25%	0	0%
3	75%	2	100%
0	0%	1	50%
2	50%	1	50%
1	25%	0	0%
0	0%	0	0%
2	50%	0	0%
1	25%	0	0%
2	50%	0	0%

2	50%	0	0%
0	0%	2	100%
1	25%	0	0%
2	50%	1	50%
0	0%	1	50%
1	25%	1	50%
1	25%	1	50%
1	25%	1	50%
2	50%	0	0%
2	50%	1	50%
0	0%	0	0%
0	0%	0	0%
0	0%	0	0%
<b>4</b>		<b>2</b>	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Cedar Glen	% of Cedar Glen
Information about resources & services	1	100%
Affordable Housing	0	0%
Rental Assistance	1	100%
Utility Assistance	1	100%
Shelter-Emergency	0	0%
Shelter-Transitional	0	0%
Food & Nutrition Programs	0	0%
Education & Training Programs	0	0%
Jobs/Employment	1	100%
Family support services	0	0%
Affordable health & dental care	0	0%
Affordable mental health services	0	0%
Mental Health assistance	0	0%
Affordable child care	0	0%
Accessible & reliable transportation	0	0%
Legal assistance	1	100%
QUESTION 1-B: CRITICAL SERVICE GAPS		
Information about resources & services	1	100%
Affordable housing	0	0%
Shelter	1	100%
Food & Nutrition Programs	0	0%
Education & Training Programs	0	0%
Family support services	0	0%
Affordable health & dental care	0	0%
Affordable mental health services	0	0%
Affordable child care	0	0%
Transportation	0	0%
Legal assistance	0	0%
Services for particular population groups	1	100%
Services for particular ethnic or cultural groups	0	0%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>1</b>	

0	0%	1	100%
1	100%	0	0%
0	0%	0	0%
1	100%	0	0%
0	0%	1	100%
0	0%	1	100%
1	100%	1	100%
0	0%	0	0%
0	0%	0	0%
0	0%	0	0%
0	0%	1	100%
0	0%	0	0%
0	0%	1	100%
1		1	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Colton	% of Colton
Information about resources & services	7	41%
Affordable Housing	11	65%
Rental Assistance	9	53%
Utility Assistance	7	41%
Shelter-Emergency	4	24%
Shelter-Transitional	0	0%
Food & Nutrition Programs	4	24%
Education & Training Programs	5	29%
Jobs/Employment	9	53%
Family support services	4	24%
Affordable health & dental care	7	41%
Affordable mental health services	1	6%
Mental Health assistance	0	0%
Affordable child care	5	29%
Accessible & reliable transportation	1	6%
Legal assistance	0	0%
QUESTION 1-B: CRITICAL SERVICE GAPS		
Information about resources & services	5	29%
Affordable housing	10	59%
Shelter	6	35%
Food & Nutrition Programs	4	24%
Education & Training Programs	8	47%
Family support services	4	24%
Affordable health & dental care	11	65%
Affordable mental health services	2	12%
Affordable child care	4	24%
Transportation	2	12%
Legal assistance	6	35%
Services for particular population groups	1	6%
Services for particular ethnic or cultural groups	1	6%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>17</b>	

## needs and opportunities corps questionnaire

Crestline	% of Crestline	Grand Terrace	% of Grand Terrace
1	50%	0	0%
2	100%	1	100%
1	50%	1	100%
1	50%	1	100%
1	50%	0	0%
1	50%	0	0%
0	0%	1	100%
0	0%	0	0%
1	50%	0	0%
0	0%	1	100%
1	50%	0	0%
0	0%	0	0%
0	0%	0	0%
1	50%	0	0%
0	0%	0	0%
1	50%	0	0%
1	50%	1	100%
2	100%	1	100%
2	100%	0	0%
0	0%	0	0%
0	0%	0	0%
1	50%	1	100%
1	50%	0	0%
0	0%	0	0%
1	50%	1	100%
0	0%	0	0%
1	50%	1	100%
1	50%	0	0%
0	0%	0	0%
2		1	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Fawnskin	% of Fawnskin
Information about resources & services	1	100%
Affordable Housing	1	100%
Rental Assistance	1	100%
Utility Assistance	1	100%
Shelter-Emergency	0	0%
Shelter-Transitional	0	0%
Food & Nutrition Programs	0	0%
Education & Training Programs	0	0%
Jobs/Employment	1	100%
Family support services	0	0%
Affordable health & dental care	0	0%
Affordable mental health services	0	0%
Mental Health assistance	0	0%
Affordable child care	0	0%
Accessible & reliable transportation	0	0%
Legal assistance	1	100%
QUESTION 1-B: CRITICAL SERVICE GAPS		
Information about resources & services	0	0%
Affordable housing	0	0%
Shelter	0	0%
Food & Nutrition Programs	0	0%
Education & Training Programs	0	0%
Family support services	0	0%
Affordable health & dental care	0	0%
Affordable mental health services	0	0%
Affordable child care	0	0%
Transportation	0	0%
Legal assistance	1	100%
Services for particular population groups	0	0%
Services for particular ethnic or cultural groups	0	0%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>1</b>	



## needs and opportunities corps questionnaire

Fontana	% of Fontana	Hesperia	% of Hesperia
11	29%	5	56%
25	66%	6	67%
25	66%	5	56%
14	37%	6	67%
1	3%	1	11%
1	3%	0	0%
12	32%	6	67%
12	32%	2	22%
25	66%	6	67%
4	11%	1	11%
16	42%	4	44%
2	5%	0	0%
1	3%	1	11%
13	34%	3	33%
7	18%	3	33%
8	21%	1	11%
13	34%	3	33%
21	55%	4	44%
5	13%	1	11%
13	34%	4	44%
16	42%	2	22%
6	16%	4	44%
11	29%	3	33%
3	8%	3	33%
14	37%	1	11%
10	26%	3	33%
8	21%	2	22%
0	0%	1	11%
3	8%	0	0%
<b>38</b>		<b>9</b>	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Highland	% of Highland
Information about resources & services	4	20%
Affordable Housing	13	65%
Rental Assistance	10	50%
Utility Assistance	9	45%
Shelter-Emergency	3	15%
Shelter-Transitional	1	5%
Food & Nutrition Programs	10	50%
Education & Training Programs	9	45%
Jobs/Employment	10	50%
Family support services	4	20%
Affordable health & dental care	3	15%
Affordable mental health services	1	5%
Mental Health assistance	0	0%
Affordable child care	4	20%
Accessible & reliable transportation	2	10%
Legal assistance	6	30%
<b>QUESTION 1-B: CRITICAL SERVICE GAPS</b>		
Information about resources & services	6	30%
Affordable housing	11	55%
Shelter	1	5%
Food & Nutrition Programs	10	50%
Education & Training Programs	9	45%
Family support services	3	15%
Affordable health & dental care	5	25%
Affordable mental health services	1	5%
Affordable child care	3	15%
Transportation	6	30%
Legal assistance	4	20%
Services for particular population groups	2	10%
Services for particular ethnic or cultural groups	2	10%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>20</b>	

## needs and opportunities corps questionnaire

Lake Arrowhead	% of Lake Arrowhead	Loma Linda	% of Loma Linda
0	0%	2	20%
1	100%	5	50%
1	100%	5	50%
1	100%	4	40%
0	0%	1	10%
0	0%	0	0%
0	0%	7	70%
0	0%	4	40%
1	100%	7	70%
0	0%	1	10%
0	0%	3	30%
0	0%	0	0%
0	0%	0	0%
0	0%	6	60%
0	0%	1	10%
0	0%	2	20%
0	0%	1	10%
1	100%	6	60%
0	0%	1	10%
0	0%	3	30%
1	100%	2	20%
0	0%	0	0%
0	0%	1	10%
0	0%	0	0%
0	0%	4	40%
1	100%	4	40%
0	0%	1	10%
0	0%	0	0%
0	0%	2	20%
<b>1</b>		<b>10</b>	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Montclair	% of Montclair
Information about resources & services	1	50%
Affordable Housing	1	50%
Rental Assistance	1	50%
Utility Assistance	1	50%
Shelter-Emergency	0	0%
Shelter-Transitional	0	0%
Food & Nutrition Programs	0	0%
Education & Training Programs	0	0%
Jobs/Employment	1	50%
Family support services	0	0%
Affordable health & dental care	1	50%
Affordable mental health services	0	0%
Mental Health assistance	0	0%
Affordable child care	1	50%
Accessible & reliable transportation	0	0%
Legal assistance	0	0%
QUESTION 1-B: CRITICAL SERVICE GAPS		
Information about resources & services	1	50%
Affordable housing	1	50%
Shelter	0	0%
Food & Nutrition Programs	1	50%
Education & Training Programs	1	50%
Family support services	1	50%
Affordable health & dental care	1	50%
Affordable mental health services	0	0%
Affordable child care	1	50%
Transportation	1	50%
Legal assistance	0	0%
Services for particular population groups	0	0%
Services for particular ethnic or cultural groups	0	0%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>2</b>	

## needs and opportunities corps questionnaire

Muscoy	% of Muscoy	Ontario	% of Ontario
0	0%	3	30%
1	50%	6	60%
1	50%	8	80%
1	50%	5	50%
0	0%	3	30%
0	0%	0	0%
1	50%	3	30%
1	50%	1	10%
2	100%	4	40%
1	50%	2	20%
1	50%	3	30%
0	0%	1	10%
0	0%	0	0%
1	50%	3	30%
0	0%	1	10%
1	50%	1	10%

0	0%	6	60%
1	50%	5	50%
1	50%	1	10%
1	50%	4	40%
1	50%	4	40%
0	0%	1	10%
1	50%	7	70%
0	0%	0	0%
1	50%	2	20%
1	50%	3	30%
0	0%	3	30%
0	0%	0	0%
0	0%	2	20%
<b>2</b>		<b>10</b>	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Phelan	% of Phelan
Information about resources & services	2	100%
Affordable Housing	0	0%
Rental Assistance	0	0%
Utility Assistance	2	100%
Shelter-Emergency	0	0%
Shelter-Transitional	0	0%
Food & Nutrition Programs	2	100%
Education & Training Programs	0	0%
Jobs/Employment	1	50%
Family support services	0	0%
Affordable health & dental care	2	100%
Affordable mental health services	1	50%
Mental Health assistance	1	50%
Affordable child care	0	0%
Accessible & reliable transportation	0	0%
Legal assistance	1	50%
QUESTION 1-B: CRITICAL SERVICE GAPS		
Information about resources & services	2	100%
Affordable housing	0	0%
Shelter	0	0%
Food & Nutrition Programs	2	100%
Education & Training Programs	1	50%
Family support services	0	0%
Affordable health & dental care	2	100%
Affordable mental health services	1	50%
Affordable child care	0	0%
Transportation	0	0%
Legal assistance	1	50%
Services for particular population groups	1	50%
Services for particular ethnic or cultural groups	0	0%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>2</b>	

## needs and opportunities corps questionnaire

Rancho Cucamonga	% of Rancho Cucamonga	Redlands	% of Redlands
1	25%	4	31%
1	25%	11	85%
4	100%	7	54%
3	75%	6	46%
1	25%	2	15%
1	25%	2	15%
1	25%	6	46%
1	25%	6	46%
3	75%	5	38%
0	0%	3	23%
2	50%	8	62%
0	0%	3	23%
0	0%	3	23%
0	0%	7	54%
0	0%	2	15%
0	0%	4	31%
2	50%	4	31%
4	100%	9	69%
2	50%	3	23%
0	0%	5	38%
2	50%	5	38%
0	0%	3	23%
4	100%	6	46%
1	25%	4	31%
0	0%	8	62%
0	0%	3	23%
0	0%	5	38%
0	0%	1	8%
0	0%	1	8%
<b>4</b>		<b>13</b>	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Rialto	% of Rialto
Information about resources & services	15	50%
Affordable Housing	22	73%
Rental Assistance	18	60%
Utility Assistance	15	50%
Shelter-Emergency	3	10%
Shelter-Transitional	0	0%
Food & Nutrition Programs	7	23%
Education & Training Programs	9	30%
Jobs/Employment	19	63%
Family support services	5	17%
Affordable health & dental care	8	27%
Affordable mental health services	3	10%
Mental Health assistance	6	20%
Affordable child care	7	23%
Accessible & reliable transportation	3	10%
Legal assistance	4	13%
QUESTION 1-B: CRITICAL SERVICE GAPS		
Information about resources & services	8	27%
Affordable housing	22	73%
Shelter	5	17%
Food & Nutrition Programs	7	23%
Education & Training Programs	12	40%
Family support services	4	13%
Affordable health & dental care	7	23%
Affordable mental health services	4	13%
Affordable child care	8	27%
Transportation	7	23%
Legal assistance	4	13%
Services for particular population groups	1	3%
Services for particular ethnic or cultural groups	5	17%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>30</b>	



## needs and opportunities corps questionnaire

Riverside	% of Riverside	San Bernardino	% of San Bernardino
1	50%	56	37%
1	50%	89	59%
1	50%	71	47%
0	0%	80	53%
0	0%	27	18%
0	0%	9	6%
0	0%	50	33%
0	0%	41	27%
2	100%	91	61%
0	0%	14	9%
1	50%	48	32%
0	0%	7	5%
0	0%	7	5%
2	100%	33	22%
0	0%	27	18%
0	0%	22	15%
2	100%	58	39%
1	50%	80	53%
0	0%	23	15%
1	50%	40	27%
1	50%	54	36%
0	0%	24	16%
1	50%	52	35%
0	0%	12	8%
1	50%	29	19%
1	50%	49	33%
0	0%	37	25%
0	0%	6	4%
1	50%	3	2%
<b>2</b>		<b>150</b>	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Upland	% of Upland
Information about resources & services	0	0%
Affordable Housing	1	33%
Rental Assistance	3	100%
Utility Assistance	2	67%
Shelter-Emergency	1	33%
Shelter-Transitional	1	33%
Food & Nutrition Programs	1	33%
Education & Training Programs	1	33%
Jobs/Employment	1	33%
Family support services	1	33%
Affordable health & dental care	2	67%
Affordable mental health services	1	33%
Mental Health assistance	1	33%
Affordable child care	2	67%
Accessible & reliable transportation	1	33%
Legal assistance	1	33%
<b>QUESTION 1-B: CRITICAL SERVICE GAPS</b>		
Information about resources & services	1	33%
Affordable housing	2	67%
Shelter	0	0%
Food & Nutrition Programs	0	0%
Education & Training Programs	1	33%
Family support services	0	0%
Affordable health & dental care	1	33%
Affordable mental health services	0	0%
Affordable child care	2	67%
Transportation	0	0%
Legal assistance	0	0%
Services for particular population groups	0	0%
Services for particular ethnic or cultural groups	1	33%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>3</b>	

## needs and opportunities corps questionnaire

Victorville	% of Victorville	Yucaipa	% of Yucaipa
4	44%	4	100%
6	67%	2	50%
6	67%	3	75%
7	78%	3	75%
1	11%	0	0%
1	11%	0	0%
3	33%	2	50%
1	11%	0	0%
6	67%	1	25%
0	0%	0	0%
2	22%	3	75%
0	0%	0	0%
0	0%	0	0%
2	22%	1	25%
2	22%	0	0%
1	11%	0	0%
2	22%	4	100%
8	89%	3	75%
0	0%	1	25%
6	67%	3	75%
2	22%	1	25%
2	22%	0	0%
4	44%	3	75%
1	11%	0	0%
2	22%	1	25%
4	44%	0	0%
6	67%	0	0%
1	11%	0	0%
0	0%	0	0%
<b>9</b>		<b>4</b>	

## needs and opportunities corps questionnaire

QUESTION 1-A: MOST CRITICAL NEEDS	Yucca Valley	% of Yucca Valley
Information about resources & services	1	100%
Affordable Housing	0	0%
Rental Assistance	1	100%
Utility Assistance	1	100%
Shelter-Emergency	0	0%
Shelter-Transitional	0	0%
Food & Nutrition Programs	0	0%
Education & Training Programs	0	0%
Jobs/Employment	0	0%
Family support services	0	0%
Affordable health & dental care	0	0%
Affordable mental health services	0	0%
Mental Health assistance	0	0%
Affordable child care	0	0%
Accessible & reliable transportation	0	0%
Legal assistance	0	0%
<b>QUESTION 1-B: CRITICAL SERVICE GAPS</b>		
Information about resources & services	1	100%
Affordable housing	0	0%
Shelter	1	100%
Food & Nutrition Programs	0	0%
Education & Training Programs	0	0%
Family support services	0	0%
Affordable health & dental care	0	0%
Affordable mental health services	0	0%
Affordable child care	0	0%
Transportation	0	0%
Legal assistance	0	0%
Services for particular population groups	0	0%
Services for particular ethnic or cultural groups	0	0%
<b>TOTAL RESPONDENTS PER CITY</b>	<b>1</b>	

# environmental scan

## appendix e bibliography for trends analysis:

The Brookings Institution Policy Briefs: *Welfare Reform and Beyond* (2002-2004)

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The Urban Institute, Assessing the New Federalism: *Short Takes on Welfare Policy and Fast Facts on Welfare Policy* (2000-2002)

# environmental scan

## appendix f findings from the participatory environmental scan activities

### MANAGEMENT TEAM DESIRED OUTCOMES EXERCISE

Ms. McLaughlin of MIG, Inc. asked the group to describe the desired outcomes the group expected from the planning process. The group's expectations are outlined below:

- Develop an expansion of services and client base.
  - Food Bank
- Create a "vested interest" within the community.
- Generate more interaction between divisions and collaboration with existing and new partners.
- Produce a Strategic Plan that is a "Road Map" to guide the organization in delivering its services.
- Improve staff morale.
- Understand changing trends to better serve our clients.
- Develop a holistic approach to our delivery of service.
- Create alternative funding sources.
  - Develop for profit services

- Involve our clients in the planning process

### STAKEHOLDER INTERVIEWS

As part of its strategic planning process, the Community Action Partnership of San Bernardino County (CAPSBC) conducted confidential interview with 20 individuals who the CAPSBC identified as key organizational stakeholders. These stakeholder interviews provide important perspectives on the issues and challenges facing CAPSBC, as well as the strengths and opportunities the organization can build on in the coming years.

The CAPSBC Management Team, whose membership includes the Executive Director and key CAPSBC staff, identified the twenty stakeholders to be interviewed. The group included partners and funders that represent community-based organizations; local, state and federal government; faith-based organizations; and other service providers.

The one-half hour interviews were conducted by telephone over a three-week period in March 2004 by Moore Iacofano Goltsman, Inc. (MIG), the strategic planning consulting team.

This report summarizes the key findings from the interviews. The results are organized by the questions asked during the interviews and, in some areas, are categorized by emerging themes.

#### 1. What is your relationship with the Community Action Partnership of San Bernardino County (CAPSBC)?

The majority of stakeholders interviewed perceive themselves to be a CAPSBC partner, while others believe their relationship with CAPSBC is more multi-faceted, including partner, funder, and adviser.

#### 2. Are you familiar with CAPSBC's mission and core programs?

While a few of the stakeholders interviewed have extensive knowledge about the agency's full range of programs, most are only aware of the

## findings from the participatory environmental scan activities

programs that directly involve or affect their agency. CAPSBC programs that were cited most frequently included:

- Energy Conservation & Weatherization
- Homeless Coalition

### 3. What do you think are CAPSBC's greatest strengths?

According to the stakeholders, the Community Action Partnership's greatest strengths include:

#### Experienced Staff

- Experience
- Flexibility
- Commitment
- Effectiveness in addressing the needs of their clients
- Knowledge
  - Understanding of their own organization
  - Understanding of community based organizations, service providers and clients
- Grassroots approach with little bureaucracy

#### Effective Leadership

- Excellent Board leadership

- Effective executive direction
- Focus on mission

#### Outstanding Programs

- Weatherization
- Homeless Coalition (Homeless Fair)
- Advocacy

#### Stable Funding

- Effective and resourceful fund development

### 4. Are there any areas in which you believe the organization can improve?

- Build stronger partnerships and collaborations with agencies countywide
- Increase staffing levels
- Create a client tracking system
- Expand services to clients throughout the County

### 5. What are the strengths and weaknesses of CAPSBC's current relationship with you? Are there ways that your relationship could be enhanced or strengthened?

Stakeholders identified the following strengths and weaknesses in their relationship with the CAPSBC:

#### Strengths

- Mutual understanding
- Commitment
- Follow through and responsiveness
- Flexibility

#### Areas for Improvement

- Improve communication between CAPSBC and partners/service providers
- Integrate service delivery with other providers and partner agencies
- Formalize data sharing processes
- Encourage more active participation from partners countywide

### 6. Are there ways in which CAPSBC can better serve its customers? What suggestions do you have for CAPSBC in reaching their customers and obtaining their input?

Many of the interviewees believe that the need for CAPSBC programs and services is increasing countywide. Stakeholder suggest the following strategies for better serving CAPSBC clients:

- Increase program staff
- Create a countywide intake process

## findings from the participatory environmental scan activities

with seamless referrals between systems/organizations

- Strengthen partnerships

### 7. Are there any major issues that you believe have the potential to affect CAPSBC success in the next three to five years?

#### Threats

- Regional housing crisis is displacing San Bernardino families
- Increase in the homeless population creates a greater demand for services
- Shrinking funding sources makes competition for scarce resources more intense

#### Opportunities

- Maximize new funding opportunities due to non-profit status
- Collaborate with other organizations to use resources most efficiently and effectively
- Utilize a business oriented approach and focus to manage the organization
- Develop and implement a marketing plan

### 8. How do you think CAPSBC is perceived in the community?

Overall, the stakeholders believe that CAPSBC has a good reputation, however, a number express concern that some communities in the County are not aware of CAPSBC programs and services.

### 9. What do you think is CAPSBC's impact on the low-income community in San Bernardino County?

Some stakeholders were unable to clearly articulate the extent of CAPSBC's impact on the low-income community. Others believe that:

- The agency provides services that others do not and cannot
- The low-income community is significantly impacted considering the limited CAPSBC staff resources

### 10. What do you believe should be CAPSBC's major program priorities?

The stakeholders' program priorities, in order of priority, are as follows:

- Expanding existing services to outlying areas
- Providing preventive services that focus on self-sufficiency, in addition to existing crisis services
  - Focused assistance to families
- Educating the community and

creating awareness of issues affecting CAPSBC clients

- Expanding services for the homeless
- Addressing the needs of the senior population
- Sustaining current programs

### CAPSBC STRATEGIC PLANNING ADVISORY COMMITTEE SWOT

Ms. Kate Welty of MIG, Inc. led the Strategic Planning Advisory Committee (SPAC) through an exercise to brainstorm CAPSBC'S strengths and weaknesses, as well as opportunities or challenges facing the organization. To identify preliminary ideas, the SPAC completed individual comment cards. Then Ms. Welty facilitated a discussion of common themes. The following is a summary of main themes from the committee's discussion.

#### Major Strengths

##### *Mission Clarity and Effectiveness*

- Ability to advocate for and assist clients and families who are in desperate situations—being a voice for low income families and individuals.



## findings from the participatory environmental scan activities

- Role in providing some basic needs, including home environment and personal assistance (food/clothing).
- Having a clearly identified target population.
- Being positioned as the county agency that serves low-income families; having a natural leadership role.

***Collaborations and Connections***

- Ability to pull people and agencies together.
- Connection to county government entities.
- Networking with public/private organizations that serve low income people.
- Ability to gather several agencies together.
- Ability to network with other community action agencies within California, as well as nationally, including the national Community Action Partnership network.
- Collaboration with public health, ECD, and DIPPS.
- Connection to many service providers.

***Staff***

Participants identified staff as a major organizational asset and described their strengths as including:

- Dedication and commitment
- Knowledge
- Organization
- High degree of competence
- Expertise
- Experience

***Leadership***

- Board leadership
- Executive direction, dedication and commitment in delivering services to the homeless and low income; having a very strong, knowledgeable leader
- Leadership with strength, wisdom and mercy
- Leadership and staff that are very hardworking and committed to helping the community

***Community Engagement***

- Being in touch with the community and having good credibility in the community.

- Having an active role in the community and helping those in need, from all cultural backgrounds.
- Ability to recognize community needs.
- Strength of name recognition and strong "family" identification.

***Variety of Services***

- Providing a wide range of programs and services to the poor.
- Ability to serve all areas of county with majority of services, especially feedback and weatherization.

***Organizational Values***

- A spirit of perseverance
- Genuine concern for client and the level of services they receive
- Trustworthiness
- A caring attitude that comes through to clients
- Sincere intention to make a difference

***History***

- Established programs.
- A consistent organization with 39 years of history.
- Strong history and reputation.

## findings from the participatory environmental scan activities

### *Planning and Organization*

- Strategic planning.
- Efficient management operations.
- A new nonprofit structure that gives the organization a flexibility that being a county agency did not allow.

### *Specific Programs*

- Weatherization
- The homeless fair

### *Funding*

- There is a good budget: money to do things.
- There is an ability to capture funding.

### *Areas for Improvement or Strengthening*

#### *Partnering and Collaboration*

- Increase partnerships and collaborative relationships, including more active partnerships with public school boards on policy issues.
- Build upon established partnerships to strengthen services for those in need.
- Build private sector relationships.
- Strengthen the homeless coalition.

- Integrate programs/services with those of nonprofits/other departments in multi-disciplinary system of care.
- Increase collaboration to expand services to address all issues of retraining and strengthening of clients/families—counseling to include lifestyle tools, behavioral health issues, substance abuse, domestic violence, etc.

#### *Expansion of Programs and Services*

- Expand existing programs services already serving the poor.
- Extend services to areas of county not in the central county.
- Expand other programs throughout the county (FDP, FSET).
- Increase funding and staffing for county wide case management of 800,000 low income residents—can be assessed by all agencies serving them.
- Create/enhance facilities for onsite serving of customers.
- Increase use of one-on-one case management of clients.

### *Technology Systems*

- Create ability to view services online, what they have for clients without sending them to several agencies.
- Create one coordinated database.
- Implement data system (discussed) for services to low-income/homeless, and providers of homeless services.

### *Funding*

- Secure more funding, including additional private funding.
- Increase fundraising and/or create a Board of Trustees.
- Continue to strengthen the leveraging of resources.
- Clarify to private funders what CAPSBC's relationship is with county government.

### *Staffing Levels*

- Add staff to ensure services are provided at a high level of quality.
- Increase ability of staff to multi task.
- Increase staffing to coordinate homeless group / network / coordination.

## findings from the participatory environmental scan activities

**Research and Planning**

- Develop research, for example, presenting reports on successes.
- Report on outcomes rather than outputs.
- Change with changing needs.

**Marketing and Public Awareness**

- Create a marketing plan to increase visibility.
- Increase public awareness of county's low-income situation—more public relations about extent of the problem and the need for services.
- Strengthen advocacy efforts on behalf of low-income residents.
- Increase public awareness about CAPSBC and its services.

**Organizational Improvements**

- Add administrative capacity (staffing) in certain areas/programs, especially to assist the Director in the review, preparation of supportive housing/transitional housing applications through the continuum of care.
- Enhance organizational capacity to ensure success in funding requests and applications.

- Eliminate duplication of services.
- Strengthen the Board of Directors.

**External Opportunities****Partnership and Collaborative Opportunities**

- Enhance CAP's partnership role to serve as a coalescing unit to leverage resources. Show that SBC is truly working together to serve those in need; this will set us apart when competing for grants.
- Identify community outcomes that CAP shares with other organizations, for example, talk to Mount Baldy United Way about shared community outcomes/potential program opportunities.
- Lead the way with database of clients and needs.
- Plan for system of care redesign for child welfare service provision—it will involve CAPSBC services.
- Create a centralized "mall of services" with partners.
- Work with other efforts: United Way and First 5 needs assessments, those on the front lines service the low-income families, and the homeless task force. Work with High

Desert Collaborative; they are currently working on a process for developing multidisciplinary service provision and case management. Connect to other county collaboratives to increase numbers of those working on the problems.

**Marketing and Outreach**

- Improve marketing and get out into the community.
- Explore shared branding opportunities such as working with the HD Collaborative.
- Conduct outreach in areas with growing populations (desert population shifts).
- Conduct outreach at large community events to allow marketing opportunities. Health fairs, seminars, expos, etc. Having those types of events possibly annually to build image and educate community.

**Organizational Growth and Flexibility**

- Take advantage of CAPSBC's full non-profit status and ongoing growth as an organization.

## findings from the participatory environmental scan activities

- Leverage this strategic planning process.
- Consider forming a for-profit entity.
- Take advantage of the moving of services to the non low-income.
- Leverage technological improvements.

### *Funding*

- Shape your results from services provided to help get funding based on your long history of success. Governmental politics are starting to focus on outcomes and research based programs to distribute funds.
- Seek private funding.
- Be prepared to take advantage of more funding and sympathy for CAP's programs based on the potential greater awareness of the problems of low-income people combined with a strong economy may provide.

### *Business Partnerships*

- Target new businesses coming to San Bernardino as potential partners and funding sources. Consider housing developers as potential funders/partners.

### *Opportunities with Faith-Based Organizations*

- Partner with faith-based services, which are increasing in number. Not being a county agency, CAPSBC can partner more strongly with the faith-based community.

### *External Threats or Challenges*

#### *Funding*

- Tight funding climate, including state and federal reduction in funding (which impacts all programs and collaborations).
- Perception that CAPSBC is governmental or quasi-governmental could hurt funding.
- Funding availability (also an opportunity to rise to the top through collaborations).
- The war in Iraq, terrorism, and the state budget problems may hinder CAPSBC's in its attempt to secure funding and generate support for programs that assist low-income people.
- National economic trends.
- Other agencies that may want/compete for current funding.

- Funding competition: there are new organizations applying for the same funding source.
- High cost of living means increase in wages-but without additional funding, CAPSBC may not be able to support its operation.

### *Marketing and Image*

- Community perception that CAPSBC is a governmental entity; need to educate the public that it is no longer with the county and is a 501(c) (3).

### *Political Support*

- A potential climate of bias against helping low-income people. One needs to be able to show that helping this population helps everyone.
- County and city politics and a lack of support for the local government. Address the apathy of the general public and elected officials.

### *Demographics*

- As population shifts geographically, CAPSBC will need to anticipate reallocation of resources.
- Great increases in population.

## findings from the participatory environmental scan activities

- Rising homelessness and poverty.
- More “demand” than “supply” in terms of services.

**Staffing**

- Lack of adequate staffing.
- No room to expand for staff.

**Priorities**

Next, the group identified high-priority issues identified during the SWOT discussion. Each participant placed 3-5 dots next to the topics recorded on a large wallgraphic. The following items were identified as important topics:

**Strengths**

- Leadership
- Staff
- Being the voice of the community and underrepresented populations
- Service to all county regions

**Areas for Improvement**

- Greater presence and visibility
- Additional staff
- Reporting on outcomes, not units of service
- Lack of a grant writer

**Opportunities**

- Collaborative efforts

**CAPSBC BOARD SWOT**

During the Board meeting held on Tuesday, April 20 the Board of Directors participated in a facilitated workshop as part of the strategic planning process. The purpose of the exercise was to allow the Board an opportunity to offer their perspective on the CAPSBC’s Strengths, Weaknesses, Opportunities and Threats (SWOT) that will affect the organization in the next five years. In addition to the thirteen Board members who participated in the exercise, a number of staff members, including the Executive Director, were also present. After briefly explaining the strategic planning process, the consultant from MIG, Inc facilitated the SWOT workshop. The following is a brief summary of the discussion.

**Strengths**

When asked to identify the Community Action Partnership’s greatest strengths, Board members responses include:

**Staff**

- There are a number of long-term employees, some between 15-20 years.
  - Clients have become employees.
- We have a committed staff.
- Our staff is knowledgeable and abreast of current legislation and trends.
- Staff has great organizational skills.
- The staff members are responsive to needs and act quickly during emergencies.

**Outstanding Programs**

- CAPSBC’s is one of the few agencies that provides “true” case management and referrals.
- The Homeless Coalition is a great model and vital to our communities.
- We advocate on behalf of all of our clients.

**Resources/Funding**

- We feature cost effective, quality programs that are a “good bang for your buck!”
- We are successful at leveraging funds with other organizations.

## findings from the participatory environmental scan activities

- We are proactive in obtaining grants.

### *Effective Leadership*

- CAPSBC management shows great leadership.
- The Board's experience and background is a great asset.

### *Reputation*

- The Partnership has a good track record with the community.
- The Board of directors and staff are respected in the community.

There was a dialogue about CAPSBC being one of the best CAP's in the Community Action Agency network. Some of the Board Members believe this to be true while others believe this can be possibly achieved through the strategic planning process.

### *Weaknesses*

The consultant asked the group to identify areas of improvement for the organization. Board members responses are recorded below.

### *Staff*

- The depth of the management is limited.

### *Programs*

- There is an increasing need for our services countywide.
- Programs are built around need and not necessarily around the agency's mission.
- Programs overlap.

### *Organizational/Management*

- The agency's mission is not clearly defined.
- The Board membership needs to be broadened to include elected officials.
- Roles for the Board are unclear.

### *Communication*

- There is a lack of PR presence in the outlying communities.

### *Opportunities*

The Board identified the following as opportunities that the CAPSBC should pursue:

### *Staff*

- Redefine the Board of Directors' roles.
- Provide best quality services countywide.

- Provide more PR with the new Community Action Agency look.
- Make information available to the community countywide.

### *Programs*

- Expand programs to meet the needs of the growing community and its cultural diversity.
- Build on existing successful programs such as the savings account program.
- Create employment for clients through partnerships with private collaborations.
- Partner with community based organizations to leverage their expertise in providing CAPSBC services (for example the Shriners).

### *Resources/Funding*

- Seek private funding sources.
- Maximize funding opportunities through new non-profit status.
- Increase funding.
- Create partnerships with private enterprise and public agencies such as learning institutions.

## findings from the participatory environmental scan activities

**Organizational/Management**

- Provide training and education for partners.
- Use models such as “one stop services” to improve service delivery.

**Communication**

- Lobby for ourselves to create a greater awareness.
- Utilize speakers bureau to promote advocacy.
- Create agency “branding” to promote organization and expand existing marketing materials.

**Threats**

Issues that may have an impact on the way the CAPSBC provides its programs and services in the next five years include:

- Lack of affordable housing has the potential to displace many low-income residents therefore creating a greater need for CAPSBC services.
- There is competition for fewer available funds.
- Budget cuts threaten programs.
- The need in San Bernardino County is overwhelming!

- There is a lack of transportation.
- Natural disasters create an impact on CAPSBC services.
- Lack of affordable childcare creates a barrier for our clients in achieving self-sufficiency.
- Policies that are “unfriendly” to social service agencies are a recent trend.

**STAFF VALUES AND OPPORTUNITIES WORKSHOP****Our Organization**

The group reviewed the questions and related what the CAPSBC, as an agency, does best and initiatives the organization could take to best make use of those competencies.

The **Core Competencies** of the organization are:

**Empowering and Relevant****Assistance**

- We can help people meet their most pressing needs
- We have a diversity of programs
- Our programs uplift and empower the community
- We can change lives

**Advocacy**

- We provide effective advocacy for the poor
- We effectively articulate needs

**Leadership**

- We are able to generate funding
- We are well-respected and well-positioned

Opportunities and initiatives that could help take advantage of those competencies are:

**Assistance**

- Do more to meet those with the most need
- Provide more for the homeless
- Address barriers to seniors without resources—e.g. transportation access to senior nutrition program for those who can’t afford the \$1.50 fare
- Target applications for grants toward the most pressing needs rather than “grant chasing”

**Advocacy**

- Do more marketing and articulate the value of our agency and services



## findings from the participatory environmental scan activities

- Advocate performance measurement that gauge effectiveness and in-depth impact of programs rather than just looking at “numbers served” (as some of our funders want to do)

### Leadership

- Create more partnerships to augment and complement our services (similar to the one with the Morongo Basin Transit Authority to provide bus service)
- Expand into for-profit areas (e.g. weatherization) to subsidize more programs
- Use our reputation as a well-respected and well-positioned agency to further our progress

The **Core Competencies** of our employees are:

### Interpersonal skills

- We are good at listening
- We are empathetic and patient
- We treat clients with dignity and respect

### Interpretive skills

- We can interpret complex requirements and protocols
- We can go beyond protocols if necessary via “creative interpretation. (however, this only occurs when a client takes the initiative to go “one step beyond”—this can create internal problems when a client believes they can go to another area for a “better” interpretation)
- We work well within constraints

### Partnering

- We are good at identifying partnerships and collaborative opportunities

### Can-do Attitude

- We try everything to assist—even though clients don’t always realize it
- We effectively articulate needs

**Opportunities and Initiatives** that could help take advantage of those competencies are:

### Action-Planning Groups

- Create employee/management groups to do action-planning on how to overcome resource limitations

- For example, strategies for serving and reaching the underserved—e.g. in Redlands where there are no shelters available for the homeless

### Guidelines and Training for Exceptions

- Create guidelines and conduct training so that employees in the field are empowered to make decisions and interpret guidelines, eliminating the need/tendency to seek alternative interpretations

### Partnerships

- Identify partnerships and collaborative opportunities

### Communications

- Expand opportunities for internal communication
- Create tools that work regardless of technology—use a combination of e-mail, on-site postings and regular mail
- Increase communications with those in the field on program status and progress, for example:
  - Grants and guidelines
  - Program advances



## findings from the participatory environmental scan activities

- Hold regular staff meetings:
  - Agency-wide staff meetings a minimum of once a quarter, but preferably once a month
  - Weekly program manager/ staff meetings
  - Meetings should be structured, with agendas developed in consultation with staff and distributed in advance, with a focus on information exchange and problem-solving

**VALUES**

Sometimes known as Guiding Principles, values are the shared beliefs, attitudes and behaviors that define the way an organization and the employees within it conduct their daily business and treat each other and their clients.

The group concluded with a discussion of responses to the questions on individual and organizational values, and how those concepts could be used to create a set of values for the organization.

As individuals we:

- Give back to the community
- Use our technical and program

expertise to provide service to the community

- Strive to have an immediate impact
- Seek and enjoy challenge
- Pursue opportunities for personal and professional growth
- Accept personal responsibility for our work

In our organization:

- Employees are empowered to make decisions in the field
- Decisions are respected and trusted
- Contributions are valued
- Employees are provided with clear direction
- Feedback is regular and constructive
- Efforts are appreciated
- Everyone contributes and does their part
- Communications are open and two-way
- Roles and assignments are clear
- Expectations clearly balance quality with deadline pressure

**NEEDS AND OPPORTUNITIES  
CORPS SUMMIT****Discussing Our Findings**

After familiarizing themselves with the emerging themes, Corps members divided into three groups for a walking workshop. At each of the stations described previously, participants reflected on the information presented and discussed the following questions:

- Would you add any key themes to the list?
- Would you add any issues under the themes?
- Which themes or issues stand out the most?

Every half hour, the groups were asked to rotate to the next workshop station so that everyone had an opportunity to learn about and comment on each area of the environmental scan. The feedback from their discussions is summarized on the following page.

**Needs & Gaps****Issues to Add**

- Better access to services in outlying areas:

## findings from the participatory environmental scan activities

- High desert (Trono, Needles, Lucerne Valley, Newberry Springs)
- Morongo Basin
- Baker
- Native American reservation
- Mountain (Big Bear)
- Mentone
- Yucaipa
- Del Rosa (92404)
- More substance abuse services
- Services for grandmothers raising their grandchildren
- Affordable health care
- Literacy programs
- Basic life-skills training
- Services for young people with disabilities
- Food and nutrition programs for children and youth
- Education about the importance of preventive health care
- Summer youth employment opportunities
- More legal aide services
- Protection for low-income residents in rental housing

- Antiquated low-income housing guidelines and policies
- Under-enrollment in health insurance programs for children
- Assistance for people with evictions or convictions on their records
- Employment and training for seniors who live on fixed incomes
- Services that treat people with dignity and respect

### *Issues that Stand Out*

- Elder abuse
- Lack of services for adults 18-50
- Affordable housing
- Limited access to information about services
- Number of people under or at the poverty level in the County
- Transportation

### **The State of the Organization**

#### *Areas of Strength*

#### *Issues to Add*

- Flexible staff
- Unique programs, like weatherization

- Good track record
  - Good fiscal record
  - Meet and exceed goals
  - Longevity
- A lot of people are aware of CAPSBC programs, if not the agency as a whole
- Private, non-profit status offer access to more funding opportunities

#### *Issues that Stand Out*

- Committed staff

#### *Areas to Pursue*

#### *Issues to Add*

- Expand staff training opportunities
- Build more structure within each program and division
- Enhance internal communication for more effective coordination across agency programs
- Create a full-time fundraising staff person or team
- Enhance technical support
- Increase staff focus on the agency mission and vision
- Expand nutrition education through workshops, informational materials and partnerships with other agencies

## findings from the participatory environmental scan activities

- Expand outreach
- Regularly distribute a Directory of Service in the community
- Learn more about other community agencies to increase referrals
- Expand programs for youth
- Be more responsive to client needs
  - Home visits
  - Direct assistance to seniors
  - Mobile van to provide services
  - Satellite offices in other parts of the County

**Issues that Stand Out**

- Expand funding and partnership
- Increase visibility

**External Opportunities and Challenges****Opportunities**

- Pursue new partnerships, particularly with law enforcement and corrections.
- Provide social services to prison inmates.
- Take a more proactive approach to serving our clients.

- Educate politicians.
- Partner with and tap into senior resources.
- Consider creative ways to partner with agencies to make home ownership available to the low-income population.

**Challenges**

- Legal government entities do not support low-income community.
- Clients turn to crime because of need.
- Scarce funding exists for seniors.
- Engaging providers in process is a challenge.
- The prison population does not meet many of the requirements for support (e.g., Section 8).

**IDENTIFYING OUR PRIORITIES**

At the beginning of the walking workshop, Corps members had been given six "priority cards". As they traveled through the walking workshop, they were asked to use the cards to note their individual priori-

ties. At the end of the Summit, participants reconvened as a large group to share what they had written on their cards. The themes below emerged from the large group discussion. The numbers in parentheses indicate the number of participant comments related to the issue.

**Attention to Service Gaps for CAPSBC Clients (15)****Accessible, Reliable Transportation (3)**

- Consider mobile vans (1)

**Affordable Housing (4)**

- Consider capital gain grants to build transitional housing and permanent for homeless/low-income families (3)

**Affordable Health Care (4)**

- Health (4)
- Mental Health (2)
- Dental Care (1)
- Vision Care (1)

**Employment Opportunities & Training (3)**

- Employment opportunities (1), especially for seniors (1)

## findings from the participatory environmental scan activities

- Employment and training opportunities (1)

### *Youth Services (2)*

### *Services for Adults 18-50 (2)*

#### *Other Needs & Gaps*

- Legal aid for clients (1)
- Elder abuse services (1)
- Literacy programs (1)
- Affordable child care (1)
- Access to quality educational opportunities (1)

### *Expanded and Diversified Funding (7)*

- Secure funding for more programs (5)
- Partner with seniors for funding opportunities (2)
- Pursue funding opportunities that allow flexibility in how programs and services are administered (1)

### *New Strategic Partnerships (7)*

- Partner with corrections and law enforcement (3)
- Partner with faith-based organizations (2)
- Network with and engage other service providers (2)

- Partner with city parks and recreation to establish community centers in areas of need (1)

### *Internal Opportunities (5)*

- Increase program monitoring (1)
- Enhance organization structure within division (1)
- Expand staff training opportunities (1)
- Become more pro-active, less reactive (1)
- Be more responsive programs for the varying needs of clients (1)

### *Program Expansion throughout the County (4)*

- Create satellite offices within existing non-profits in underserved areas (3), especially 92404 (2); provide HEAP, F.D.P., F.S.E.T. (1)

### *CAPSBC Visibility (3)*

#### *Uncertain Political Climate (3)*

- Educate and influence local policy makers (3)

#### *Other External Challenges (1)*

- Change the law and justice system (1)

## CLIENT FOCUS GROUP

### **Introduction**

On Wednesday, July 21, 16 Community Action Partnership clients attended a focus group at the Pastoral Center of the Diocese of San Bernardino. The purpose of the focus group was to solicit input about specific service areas that emerged as critical gaps in CAPSBC's recent strategic planning activities. Following introductions, Ms. Patricia Nickols, CAPSBC Executive Director, welcomed the group and thanked them for their participation. Ms. Nickols provided a brief overview of CAPSBC, including its vision, mission and programs. Focus group participants then had the opportunity to document their ideas on a questionnaire which included questions about how CAPSBC programs and services can assist clients in the areas of: affordable housing, employment and job training, affordable healthcare, reliable transportation and childcare. The participants then shared their information during a facilitated discussion. This report summarizes the input from both the questionnaires and the group discussion.

## findings from the participatory environmental scan activities

**Summary of Input**

Esmeralda García from MIG, Inc. facilitated a discussion, which focused on how CAPSBC programs and services can assist clients in the areas of: affordable housing, employment and job training, affordable healthcare, reliable transportation and child care.

**Affordable Housing**

- Individuals with no children also need assistance.
- Housing is needed for the working poor.
- There is no rent control in San Bernardino County.
- Create affordable housing in safe neighborhoods.
- Consider a co-signer program to help in overcoming the initial rental process.
  - Landlords require income three times the rent and this is difficult for us.
  - Previous evictions are a barrier.
  - Bad credit and credit history are barriers.
- Provide programs like Habitat for Humanity that assist and encourage home ownership.

- Access to housing while on the Section 8 waiting list is critical.

- Credit repair or financial counseling.

**Employment and Job Training**

- Minimum wage jobs make it difficult to rise from poverty and instead perpetuate the condition of the working poor.
- Employ clients to work with CAPSBC programs.
- Provide scholarship programs for CAPSBC clients and their children.
- Partner with agencies to create more on the job training opportunities (ex. Option House and Urban League).
- Shared jobs between agencies.

**Affordable Healthcare**

- Families need medical treatment for children with special needs.
- Affordable healthcare is needed for the working poor and minimum wage earners.
  - Medical insurance
  - Medical clinics with sliding pay scale
  - Insurance for students

**Reliable Transportation**

- Provide discretionary bus passes above the particular program mandates.
  - Base on individual needs—students and disabled persons.
  - Partner with bus service for bulk rate.
  - Share cost with other agencies and clients.
  - Make value equal to gas vouchers.
  - Provide monthly bus passes instead of daily.

**Child Care**

- Provide affordable child care.
  - Short term during interviews
  - After-school
- Develop partnerships with child development departments at local universities to provide child care.
- Partner with agencies that have programs that provide affordable child-care.
  - CalWORKs
  - Youth
  - College mentors
- Provide child care assistance for children with special needs.
- Expand available youth activities while parents are working.

## findings from the participatory environmental scan activities

- Facilities should be safe.

### Other

- Develop a method to communicate change in program information to clients.

### Next Steps

The input from the client focus group would be shared with the CAPSBC Management Team and Strategic Planning Advisory Committee as they develop CAPSBC's Strategic Plan.

## STRATEGIC PARTNERS FOCUS GROUP

### Introduction

On Thursday, July 22, representatives from the business community, educational institutions, foundations, media and social service agencies attended a focus group at the San Bernardino County Board of Supervisors offices. The purpose of the focus group was to solicit input about CAPSBC could pursue new strategic partnerships to help its clients achieve self-sufficiency. Following introductions, Ms. Patricia Nickols, CAPSBC Executive Director, welcomed the group and thanked

them for their participation. Ms. Nickols provided a brief overview of CAPSBC, including its vision, mission and programs.

Esmeralda García from MIG, Inc. facilitated the session. Ms. García explained to the group that developing new strategic partnerships was an important theme that had recently emerged from CAPSBC's strategic planning process. She then asked the participants to fill out a brief questionnaire and encouraged their candid responses. After participants completed the forms, Ms. García led a facilitated discussion focused on how CAPSBC can develop new partnerships with the agencies represented and others. This report summarizes both the input from the questionnaires and the group discussion.

### Summary of Input

Participants discussed at length the growing need for services that assist CAPSBC clients in reaching self-sufficiency. The group also recognized that opportunities and incentives exist to collaborate with one another in providing these services, especially

with the increasing competition for funding. They believe that a comprehensive approach is needed to develop these successful partnerships. Ideas for such an approach are outlined below.

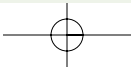
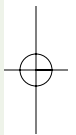
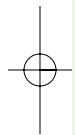
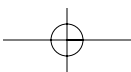
- Create a campaign to educate the community about the poor and homeless population.
  - Develop an informational website.
  - Use the "Pan Handler" model implemented by the San Bernardino Downtown Association to educate the community about homelessness, while providing referrals to clients.
- Work with the media to develop a campaign to educate the community about our clients' situations.
  - Clearly express the various types of situations—emotional and mental, level of poverty and level of need
  - Air stories about real people
  - Identify target audience and segment
  - Use public service announcements
  - Partner with the Spanish-language media

## findings from the participatory environmental scan activities

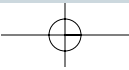
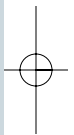
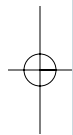
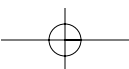
- Create a mechanism for service providers, community and faith-based organizations, and educational institutions to share information.
  - Create a roundtable discussion to share information and experience.
  - Develop an Advisory Council for each of the CAPSBC programs that represents local business, community and faith based organizations and complimentary service providers
  - Create an intra-agency job referral program to connect clients with jobs
  - Brainstorm with other service providers
- Develop ongoing relationships with businesses to leverage resources.
  - Encourage local small businesses to hire clients
  - Involve business owners in mentoring clients
  - Include business leaders in developing strategies to employ CAPSBC client base
- Identify industries unique to the resources in San Bernardino County and shifts in industry trends to train clients in these fields (ex. Logistics industry and transportation)
- Seek grants to supplement salary from local employment
- Ensure that clients are adequately trained retain jobs
- Look at resources unique to San Bernardino to identify industries that need workers.
  - Identify shifts in trends to train clients in these fields
  - Partner with educational institutions to provide training
  - Create a system to refer trainees to available jobs
- Consider new or expanded partnerships with the following organizations:
  - Boys and Girls Club
  - Redevelopment Agency
  - San Bernardino Downtown Association
  - Diocese of San Bernardino
  - Volunteers of America
  - Small Business
- Train successful CAPSBC clients to mentor new clients.

**Next Steps**

The input from the strategic partner focus group would be shared with the CAPSBC Management Team and Strategic Planning Advisory Committee as they develop CAPSBC's Strategic Plan.







family development

energy conservation/weatherization

nutrition for seniors

food bank

food stamps employment and training

inland empire individual development accounts

homeless coalition

helping people.  
changing lives.



**COMMUNITY ACTION PARTNERSHIP  
OF SAN BERNARDINO COUNTY**

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